COLLEGE of CHARLESTON

eProcure
User Manual

Table of Contents

Introduction

eProcure is the College's electronic purchasing software. This software is used to generate purchase orders. Orders are created in a shopping cart and then submitted for approval and processing. Completed purchase orders are then sent to the vendor via email or fax.

eProcure has established work-flow steps based on various criteria. Common steps include Budget Authorization, Fund Approval, IT Buyer Review, Procurement Review, etc.

For eProcure to work efficiently the Index/FOP Access Form must be updated to reflect current staff and their allowed eProcure approval limits (if any). Out-dated or non-existent forms will delay the automated ordering/approving workflow.

All College employees have access to eProcure as a shopper by default. No additional action is needed if a user will only have shopper authority.

The Office of Procurement offers monthly hands-on training sessions. Tutorials are also available on our website.

Accessing eProcure

The College's eProcure system can be accessed through MyCharleston. First, log into MyCharleston (https://my.cofc.edu). From there, click on the eProcure shopping cart icon in the top navigation bar. Clicking on the eProcure icon will launch a new window.

Common Problems Accessing eProcure

Users may occasionally experience the following problems accessing eProcure.

Internet Browser

Mozilla Firefox, Internet Explorer and Google Chrome all support eProcure. Safari is not compatible.

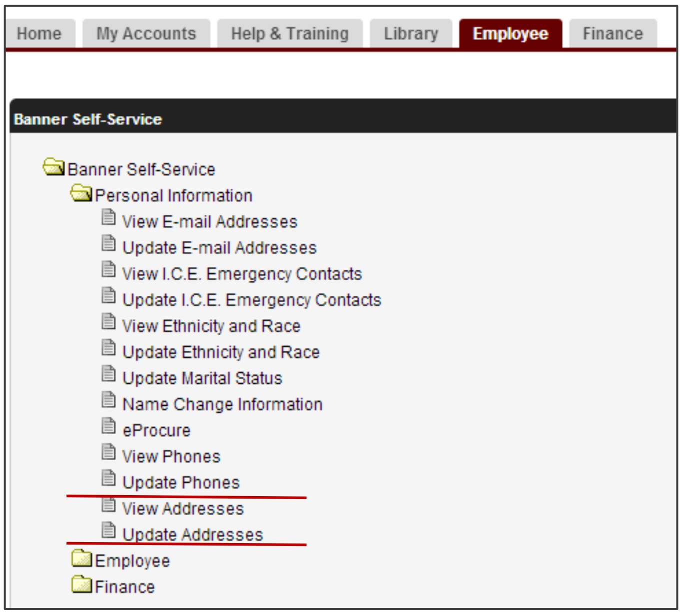
Pop-Up Blockers

The most common problem accessing eProcure is that the internet browser is blocking pop-ups. There is usually an on-screen notification explaining that a window has been blocked. The settings to change this vary from browser to browser and are not hard to change. If a blank window or no pop-up window it can be forced to open if using a PC. To force the window to open, hold down the *ctrl* key on the keyboard and simultaneously hold down the eProcure icon. If the eProcure window opens, then the problem is the pop-up blocker settings on the internet browser.

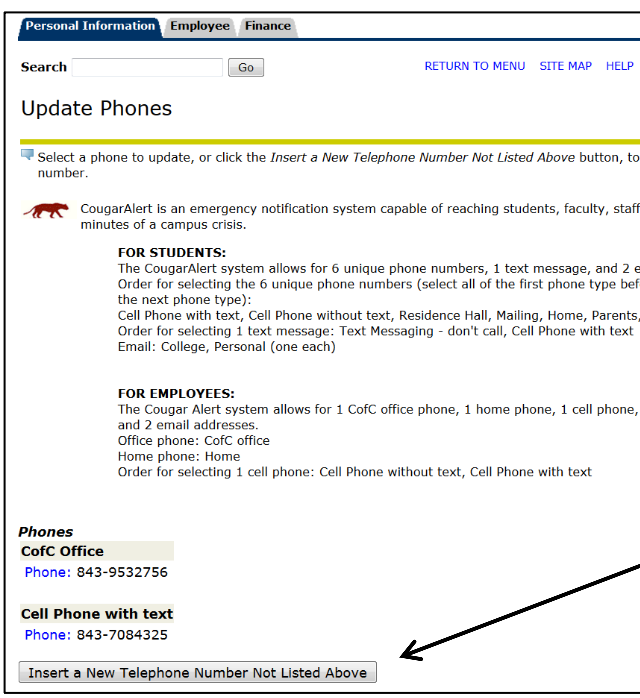
Update Contact Information

First time users experiencing difficulty accessing eProcure should verify that their College of Charleston address and business phone number is listed under the Employee Tab in Banner Self-Service.

If not, add the address and phone number, by going to MyCharleston, then the *Employee* tab, and finally to the Banner Self-Service folder (see below).



Click on the *Update Phones* link. The following page will open:

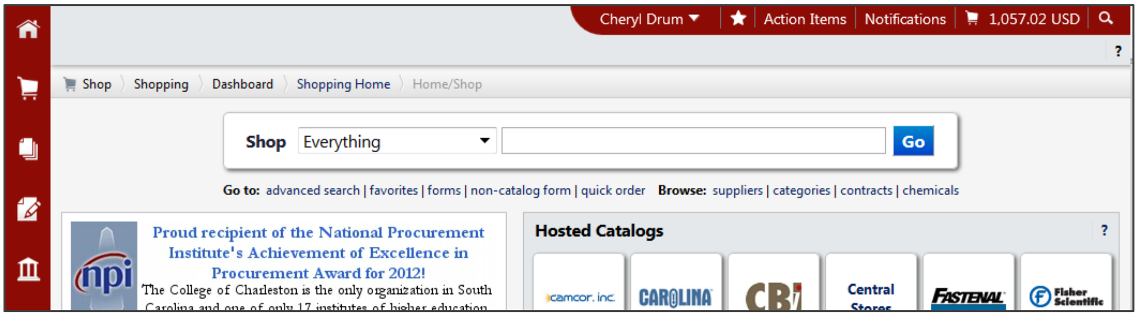


Insert a New number.

Select "College of Charleston" from the drop-down menu, insert the number (no dashes) and click on the *Submit* button.

Home/Shop Page

eProcure will open to the Home/Shop page.



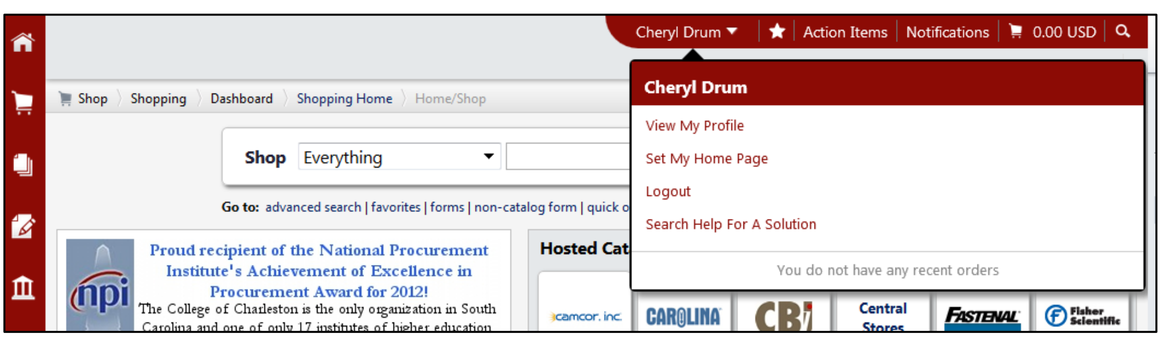
Use the left navigation bar to navigate within eProcure. Also, at the top right-hand corner of the window are short-cuts to the user's profile, pending actions, notifications and active shopping cart.

The user can also search for menu items using the Menu Search. The binoculars icon is located in the bottom left-hand corner of the Home/Shop page

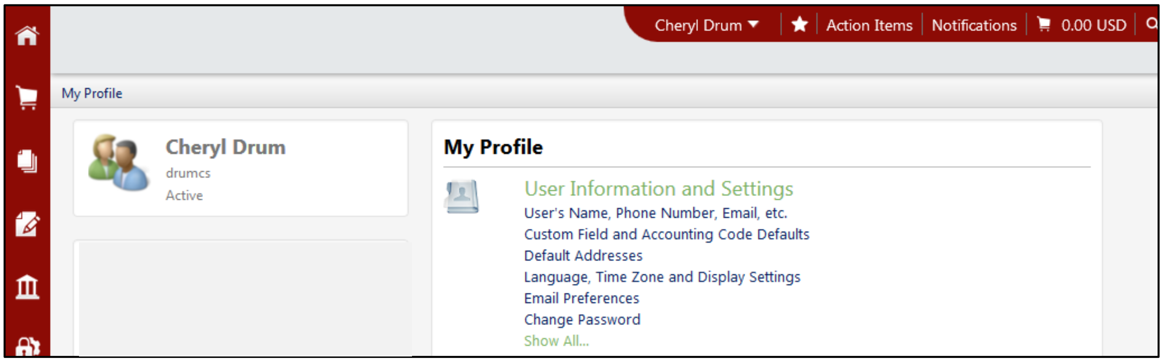
Please refer to the following sections for specific instructions on using and navigating eProcure

User Profile Settings

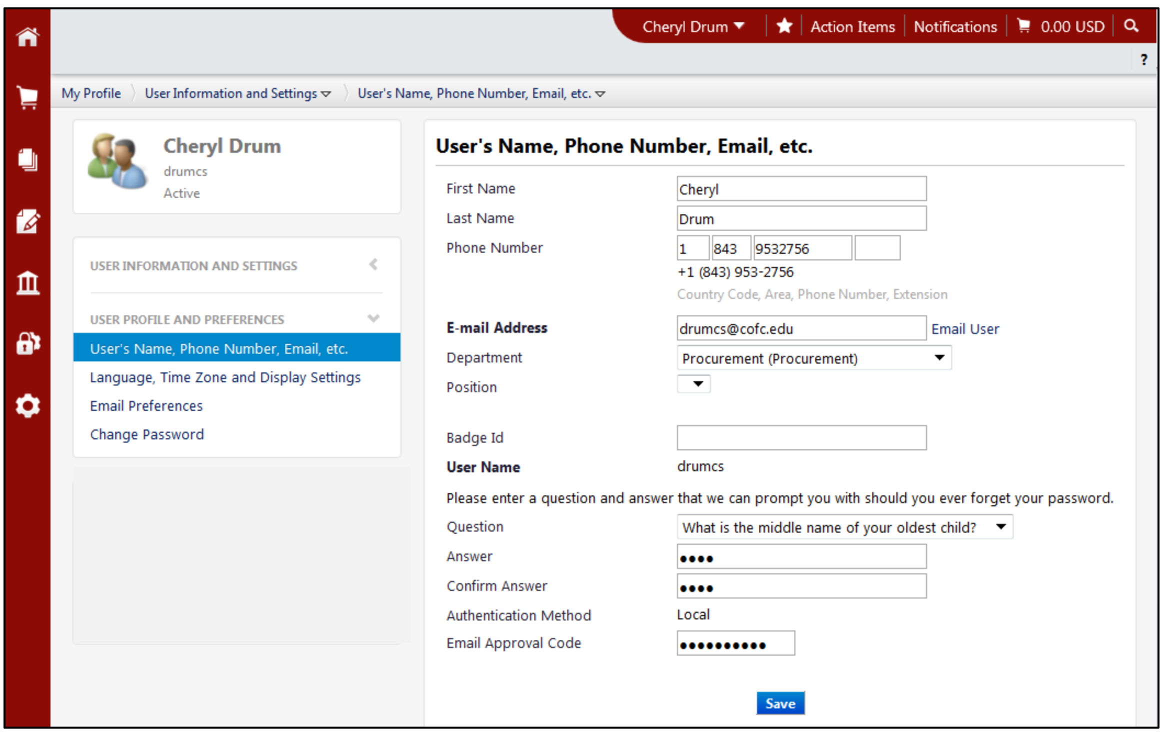
All user settings can be accessed by clicking the user's name at the top-middle of the home page. Select *View My Profile* from the menu. Contact information from Banner Self-Service is automatically loaded into eProcure.



The following page will open. From this screen, various user settings can be set-up or changed.



Settings that can be changed are listed under the *User Information and Settings* section. Click on the *User's Name, Phone Number, Email, etc*. line to add/change the department and add/change the email approval code (only for those employee's with approval authority).

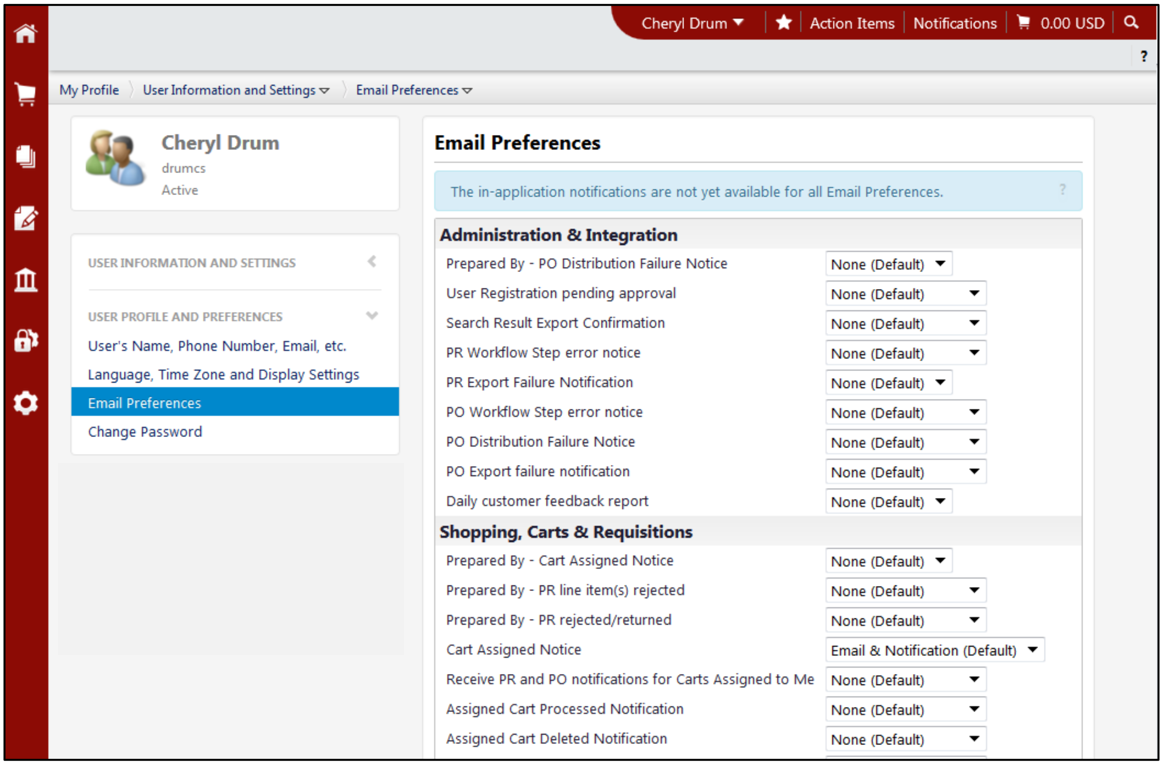


Choose the department from the drop-down menu. See Approvals section for additional information on the Email Approval Code.

Be sure to click the *Save* button when finished making changes!

Email Preferences

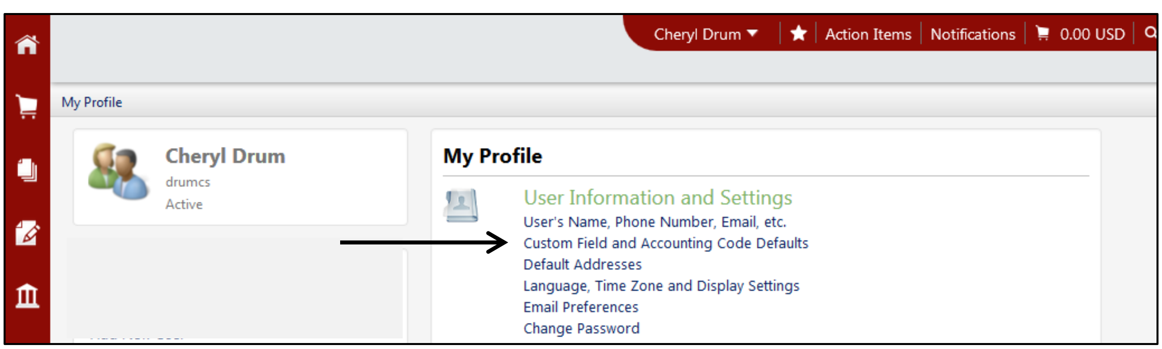
Eprocure assigns default email preferences based upon a user's role within eProcure. To view default email settings or to change settings, click on the *Email Preferences* line within the *User Profile*. Several email and notifications are set by default. There are drop-down menus next to each option to select the user's preference.



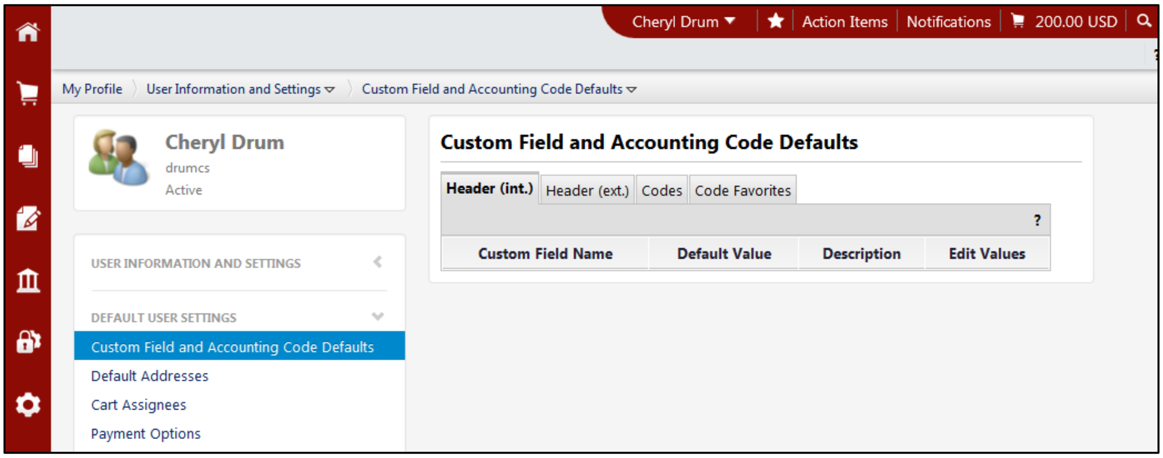
Be sure to click the *Save* button when finished making changes!

Adding a Purchasing Card

PCard holders can add their card to their user profile by selecting the *Custom Field and Accounting Code Defaults* line from the menu.

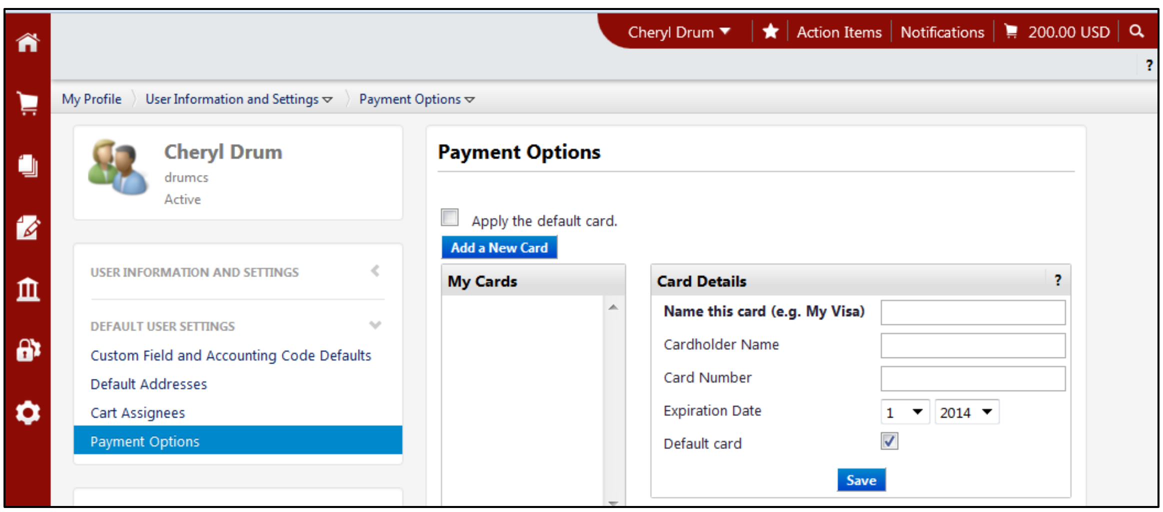


The following window will open:



Select Payment Options from the menu. The page will open to allow the user to add a new card number and store it securely.

Click the blue *Add a New Card* button and fill in the PCard information under the card details fields.



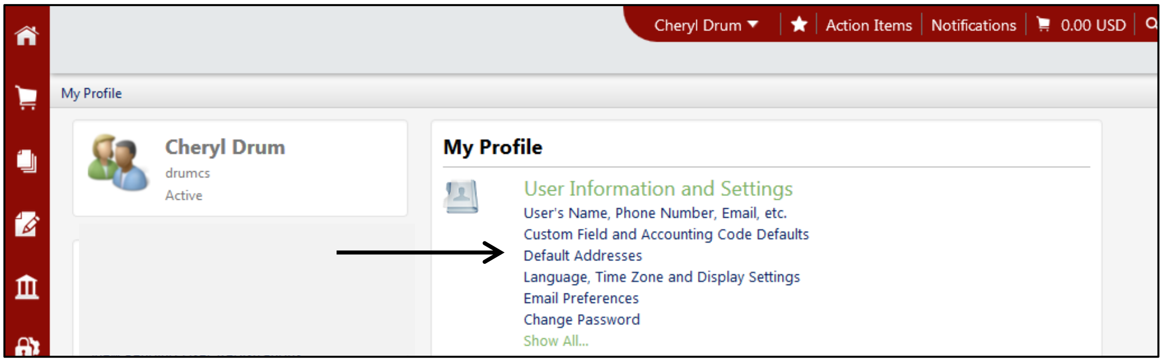
<u>Do not check</u> the "Apply the default card" checkbox or all of the orders will be paid through the PCard by default instead of through Accounts Payable.

Storing the card information in the user profile will speed up the check-out process when paying with the PCard.

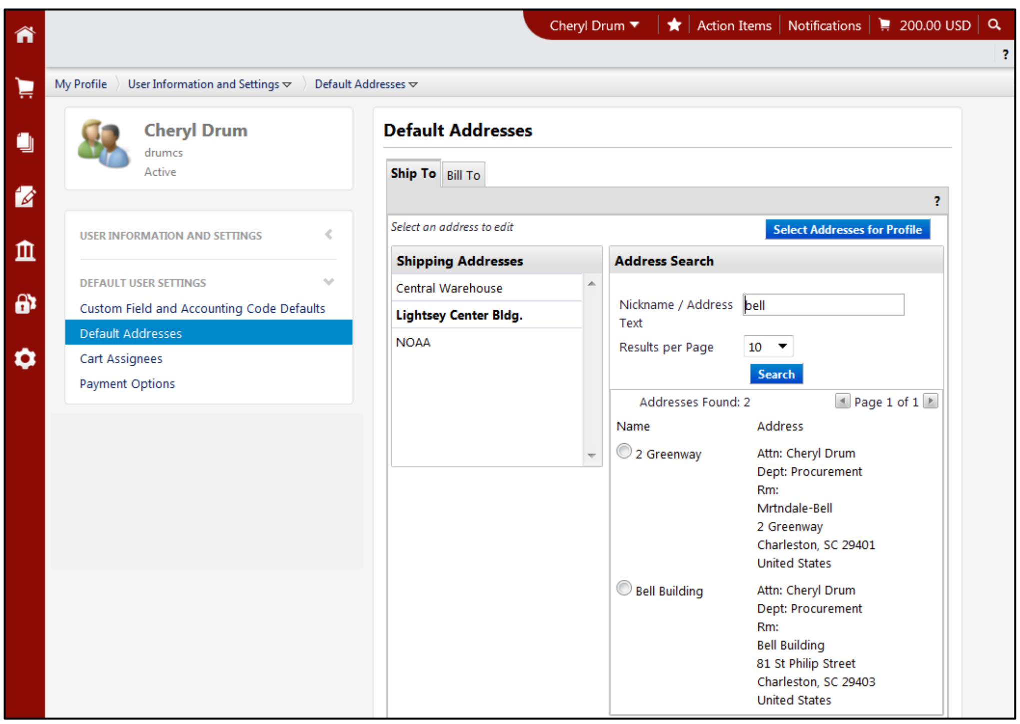
When finished, click the *Save* button!

Adding a Default Ship-To Address

The user's default address will need to be added to their profile. Click on the *Default Addresses* line within the user's profile.



To add a Ship-To address, click on the blue *Select Addresses for Profile* button. This will open a search box. Search for a College of Charleston address by entering either a partial name in the *Nickname* or *Address Text* field.



As illustrated in the screenshot above, entering "Bell" in the *Nickname* field will retrieve the Bell Building address. Alternately, entering "81" in the *Address Text* field will also return the Bell Building address.

The Procurement Office recommends searching by the Address Text field.

Once the desired address is located, select it by clicking on the radio button ( ) next to the building name. The next step allows the user to customize the address by assigning it a nickname, a default Attention-To person, Department and Room Number. The address can be set as the default address in this step by ticking the "Default" checkbox.

Users can add multiple addresses to their profile. During the check-out process, the ship to address can be changed from the default address to one in the profile. This is helpful if ordering for different locations.

Be sure to click the *Save* button when finished!

Shopping

Shopping with eProcure is very similar to shopping online at sites such as Amazon. All items to be ordered are first placed into a shopping cart. Once the cart contains all items for the order, the order is submitted by taking the cart through the "check out" process.

Shopping Roles

The requisition process in eProcure is divided between different roles:

- **Shopper:** This is the default role, and any user can be a Shopper. A Shopper has the ability to find and add items to a cart, but does not have the ability to submit a cart for ordering. A Shopper may assign a shopping cart they have created to a Requisitioner or to an Approver.
- **Approver:** An approver can do anything a Shopper can do, but an Approver can also submit carts for order up to their authorized dollar amount.

Types of Shopping

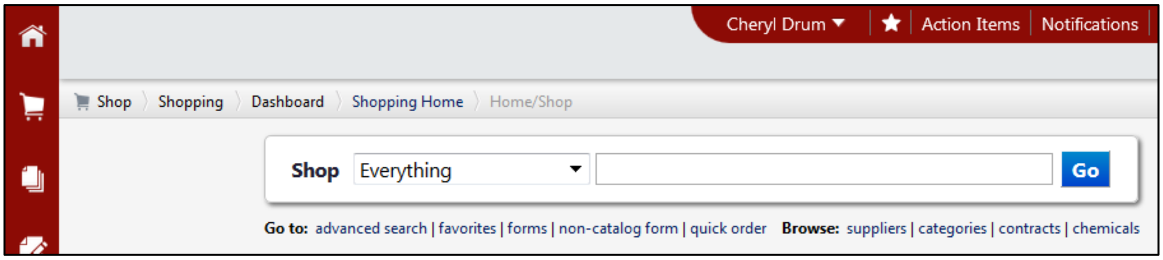
There are three ways to order items within eProcure:

- **Hosted Catalogs:** Hosted catalogs are vendors whose catalogs have been downloaded to our site. An advantage to having these catalogs hosted within eProcure is that the user has the ability to check the product details of the catalog items and compare prices and specifications, much like any major electronic shopping website.
- **Punch-out Suppliers:** Punch-outs are vendors whose catalogs are not hosted on our site. When the user clicks on a Punch-out Supplier, they are connected to the supplier's website. On that website, the user will create the order, and when finished shopping the items in the cart will be transferred back to eProcure and will appear within the user's active eProcure cart.
- **Non-Catalog Suppliers:** Much of the ordering that is done at the College will be done through Non-Catalog item shopping since the majority of the College's suppliers are not electronically integrated with eProcure and do not support electronic ordering in this fashion. This type of order is similar to filling out a paper requisition. It requires the name of the supplier, a description of the product or service and the quantity and cost of the product or service.

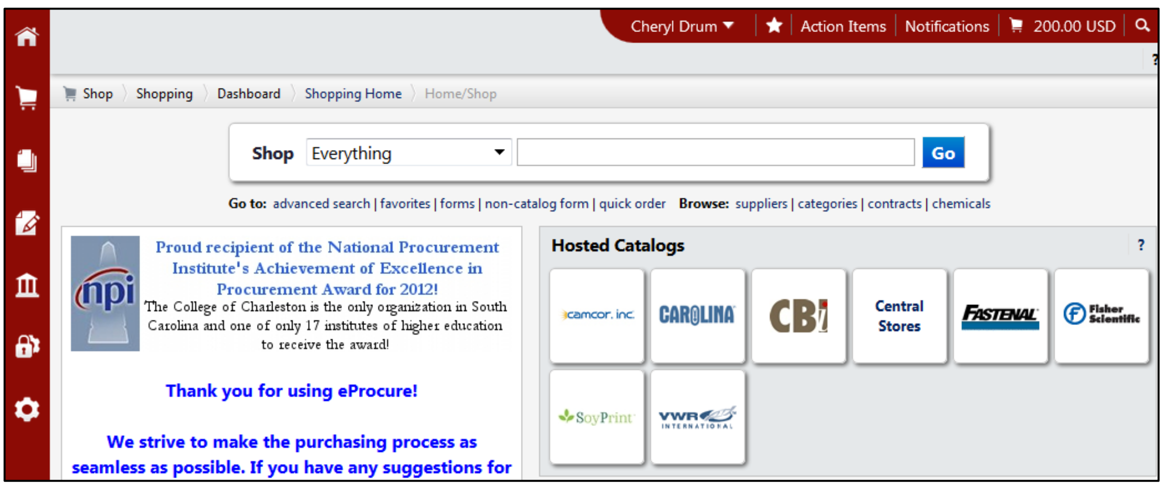
Hosted Catalog Suppliers

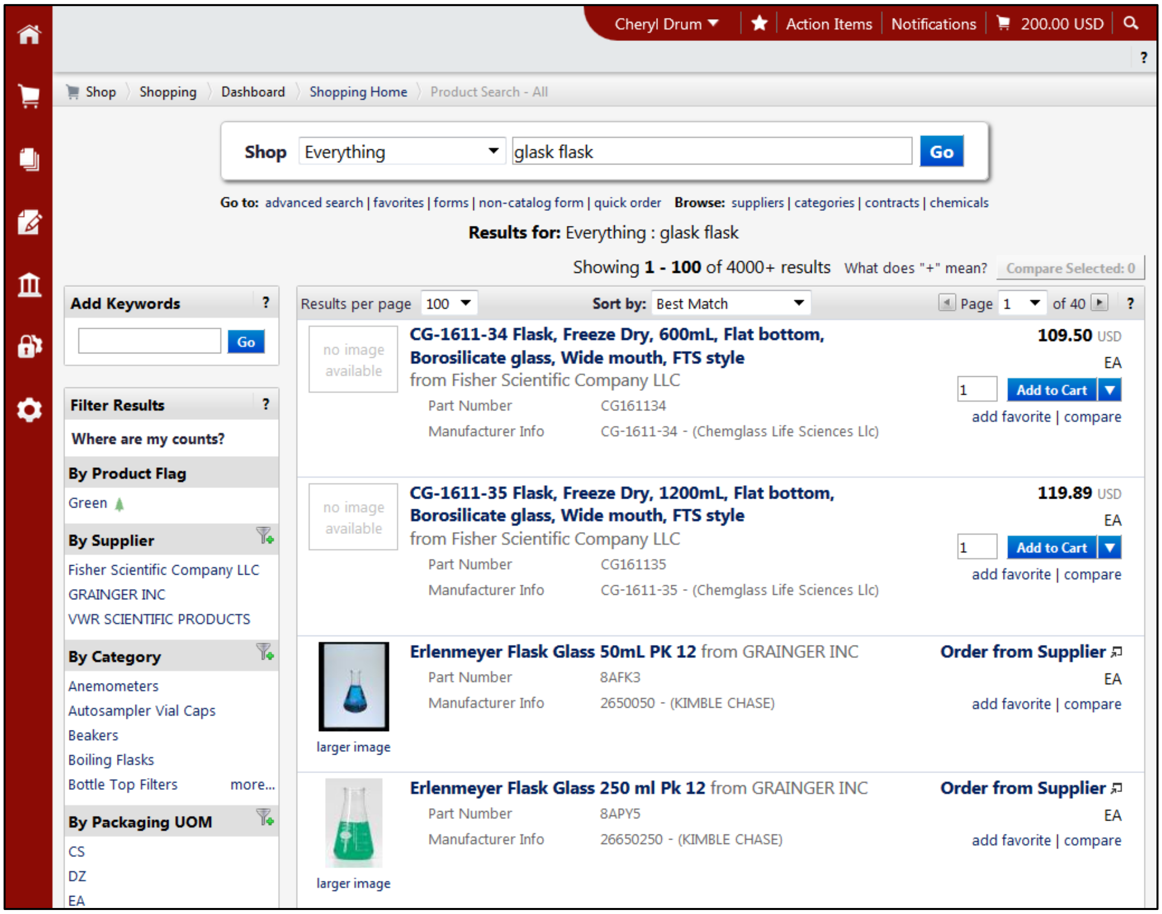
Hosted suppliers appear on the top of the main shopping page. Use the “Shop” field at the top search bar to search all suppliers and add items to the order.

Similar to an internet search engine, the user can perform a broad search using only a couple of words such as “glass flask,” or a very specific search with additional search terms (i.e. “glass flask 500ml stopper”). Using specific search terms yields fewer and more specific results.



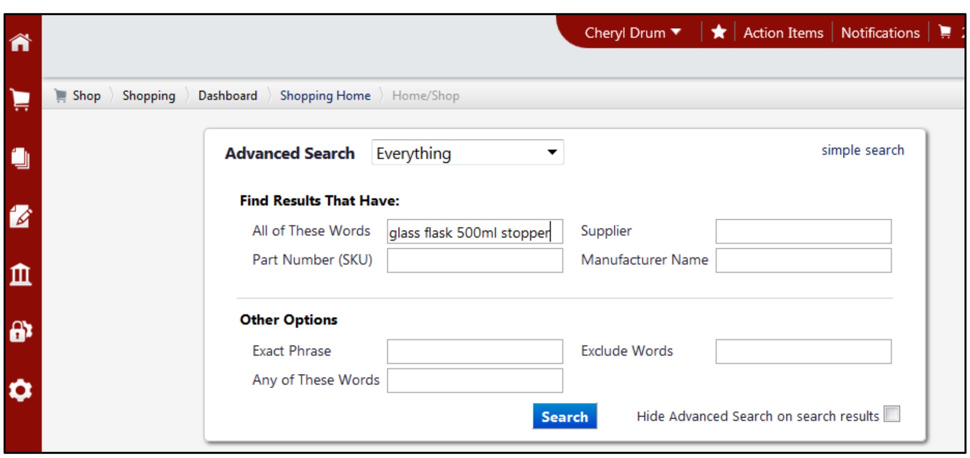
Alternately, click on the catalog icon to search only within the suppliers’ catalog in eProcure.



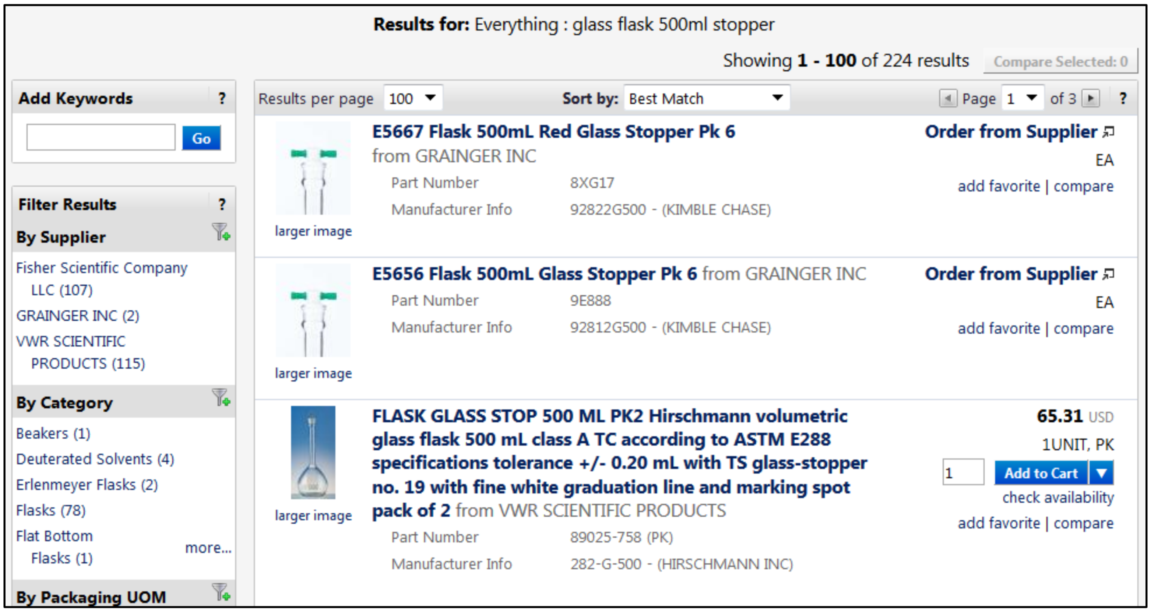


In the above picture, 4,000+ items were found for the search terms "glass flask." Narrow the results by adding Keywords or by the Filter Results box to the left of the item list.

An advanced search is accomplished by clicking the *advanced search* link below the search bar. See screenshot below.



This will expand the search area to include new fields to choose from such as Part Number (SKU), Supplier, and Manufacturer Name.

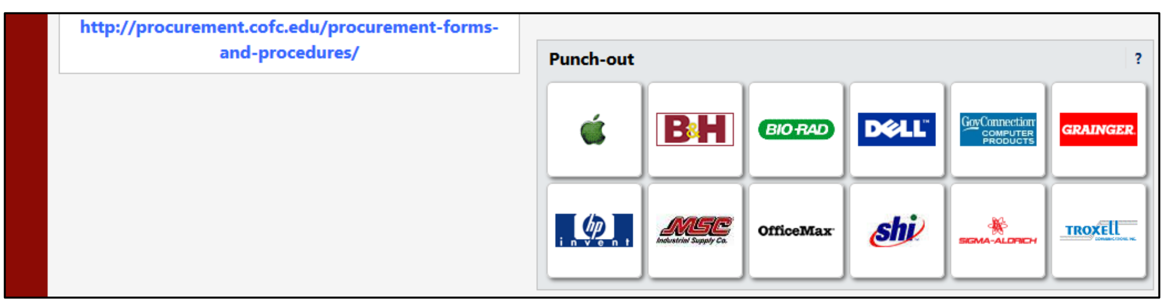


Once the desired item(s) are identified, there are several things that can be done:

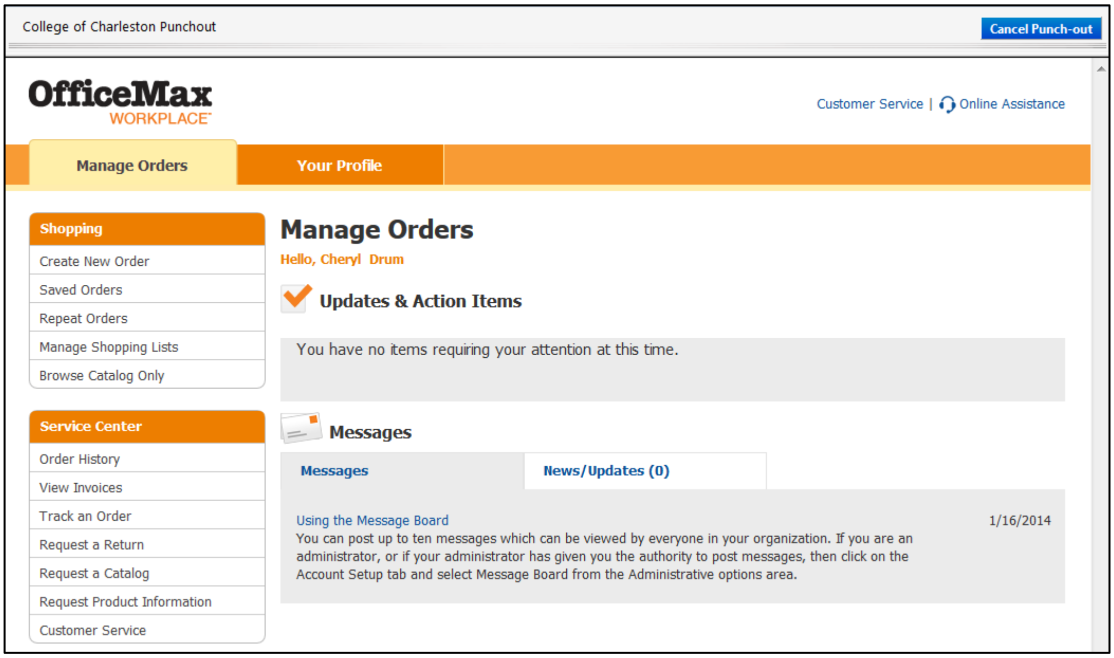
- Add the item(s) to the Cart by clicking on the blue *Add to Cart* button
- Compare two or more items by clicking on the *compare* link underneath the *Add to Cart* button and then on the *Compare Selected* button on the top of the search results
- Add an item to the favorites list for easy access by clicking on the *add favorite* link next to the *compare* link.

Punch-out Suppliers

Punch-out Suppliers all have their own dedicated websites.



For example, clicking on the OfficeMax logo will direct the user to the College of Charleston's Office Max punch-out site.

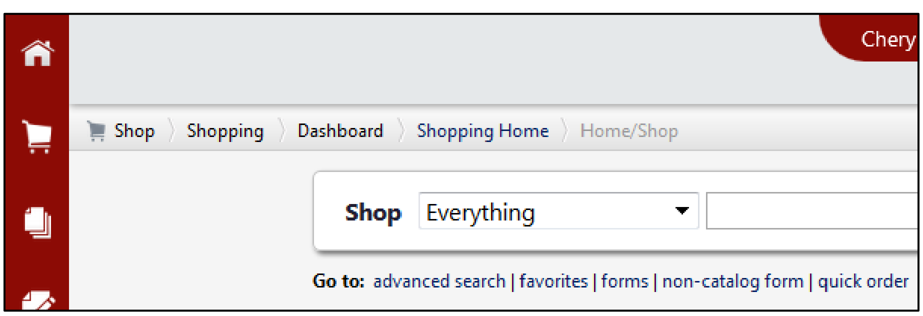


Each punch-out supplier has their unique website, each with a different layout. Shop within their site and build an order similar to shopping on any other website. Once the order is complete and goes through the checkout process, the items from the punch-out order will be transferred into the user's eProcure shopping cart. The order can then be submitted for approval.

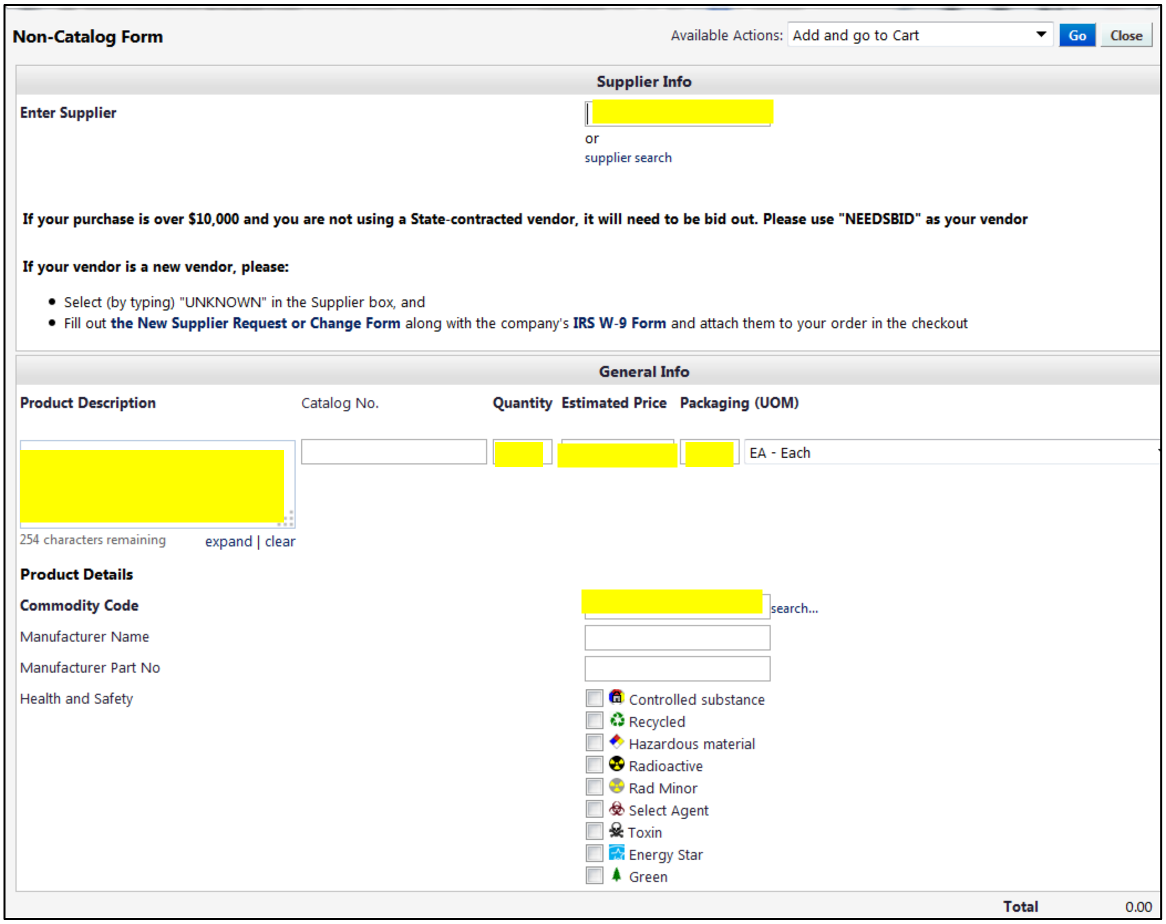
To cancel the order and return to eProcure, the user should click on the blue *Cancel Punch-out* button at the top right of the screen.

Non-Catalog Suppliers

To order goods or services from a vendor that is neither a *Hosted* nor a *Punch-out* Supplier, requires that item(s) be added to a shopping cart via the *Non-Catalog* Form. The link to the form can be found just below the "Shop" search field at the top search bar. Click on the link to open the *Non-Catalog* Form.



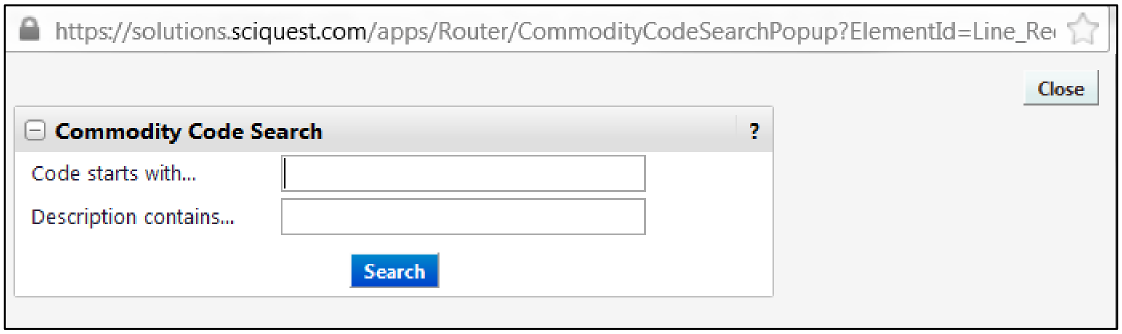
The screenshot below is an example of how the form looks in eProcure.



The fields highlighted in yellow are required to place an order.
On the form, enter the name of the supplier, a description of the good or service, quantity requested, the price estimate per item, how the item is packaged and finally the commodity code of the item or service. Complete other fields as applicable and as the information is readily available.

Do not confuse Quantity and Packaging!
For example, an order is for 2000 widgets that are packaged in lots of 500. Enter a quantity of “4”, “500” in the packaging field, and select “Lot” for the UOM from the drop-down menu.

Search for commodity code of the good or service by clicking on the *search* link next to the commodity code text box. This will open a search window in which the user can search for the commodity code by using a partial number, full number or description.



Commodity codes are standard classification codes for products and services used to detail where money is spent within an organization. It describes the item being purchased. For example, if purchasing software, the commodity code would describe the type of software (e.g. charting software, accounting software).

.

After identifying the appropriate code, click on the *select* link to the right of the description and the commodity code will appear within the field on the Non-Catalog Form.

At the end of this manual are "cheat sheets" for the most frequently used codes.

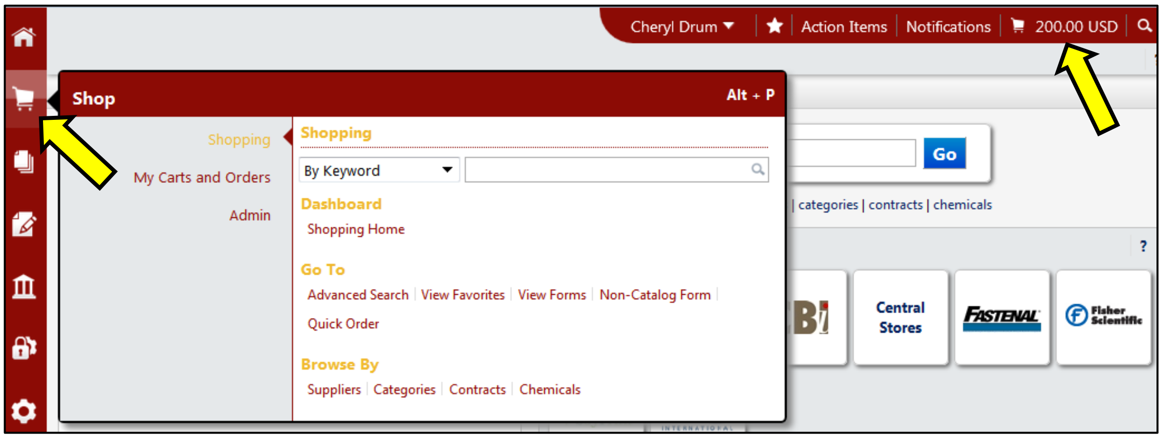
To add multiple line items or services to the order from the same supplier, click on the "Available Actions" drop-down menu, choose "Add to Cart and Return", and click the *Go* button.

Remember to add an additional line item for shipping goods/equipment. If the freight charge is not on the quote, estimate the charges to be 10 – 15% of the total cost.

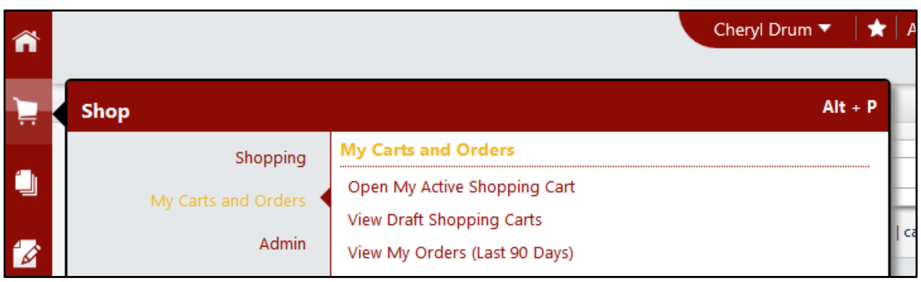
If finished with the order, choose "Add and go to Cart" from the drop-down menu and click the *Go* button. This action will open the shopping cart and all the line items entered.

Shopping Carts

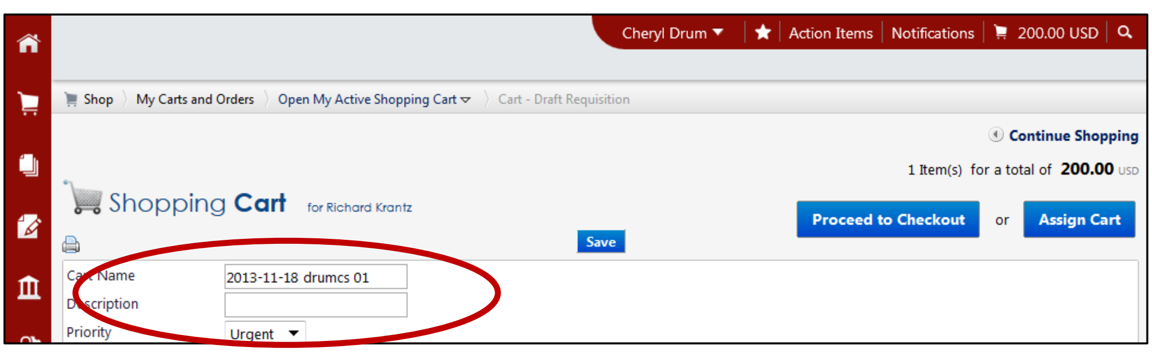
The shopping cart is where items reside until the user is ready to submit the cart to become an order. Access active, draft and assigned carts by clicking on the shopping cart icon on the left menu bar or by clicking in the cart area at the top right-hand corner of the homepage (see yellow arrows).



Opening the *carts* tab will generate several options. Click on the *My Carts and Orders* from the menu list. From here, select the active cart, view draft carts or previous orders.



Clicking on *Open My Active Shopping Cart* will open the active cart. Each cart that is created will be named <today's date> + < username> + 01 (02, 03…). Any shopping cart can be renamed by typing over the default name in the *Cart Name* text box (blue circle).



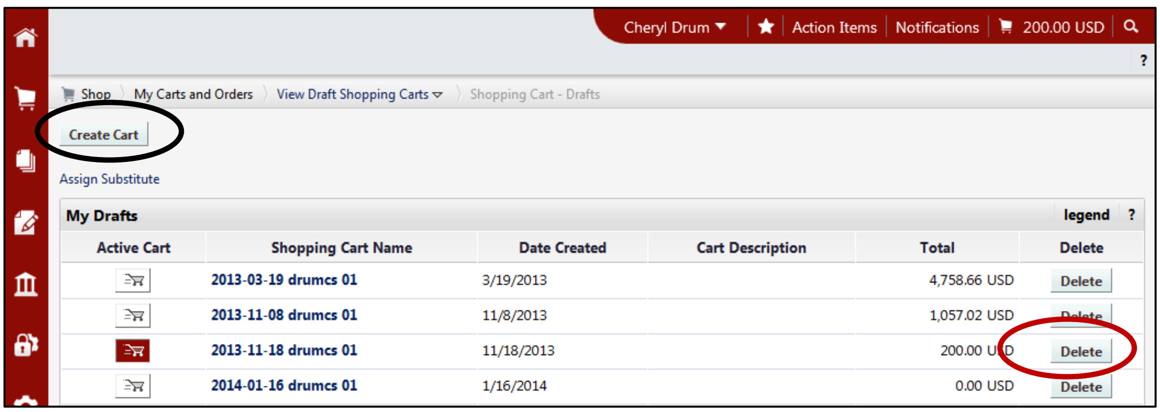
Be sure to click the *Save* button when finished renaming the cart!

Managing Carts

It is possible to have multiple carts at one time (screenshot below). To create a new cart, click on the *View Draft Shopping Carts* line from the *My Carts and Orders* Menu. This will list all of the user's draft shopping carts. The active cart is identified with a red shopping cart icon ( ) instead of white ( ).

Carts can be deleted if no longer needed. Simply click on the *Delete* button (red circle) to the far right of the cart.

To create a new, empty shopping cart, click on the *Create Cart* (black circle) button at the top left-corner of the screen. This cart will now become the active cart. The user can make any draft cart the active cart by clicking on the shopping cart icon next to the name of the desired shopping cart.

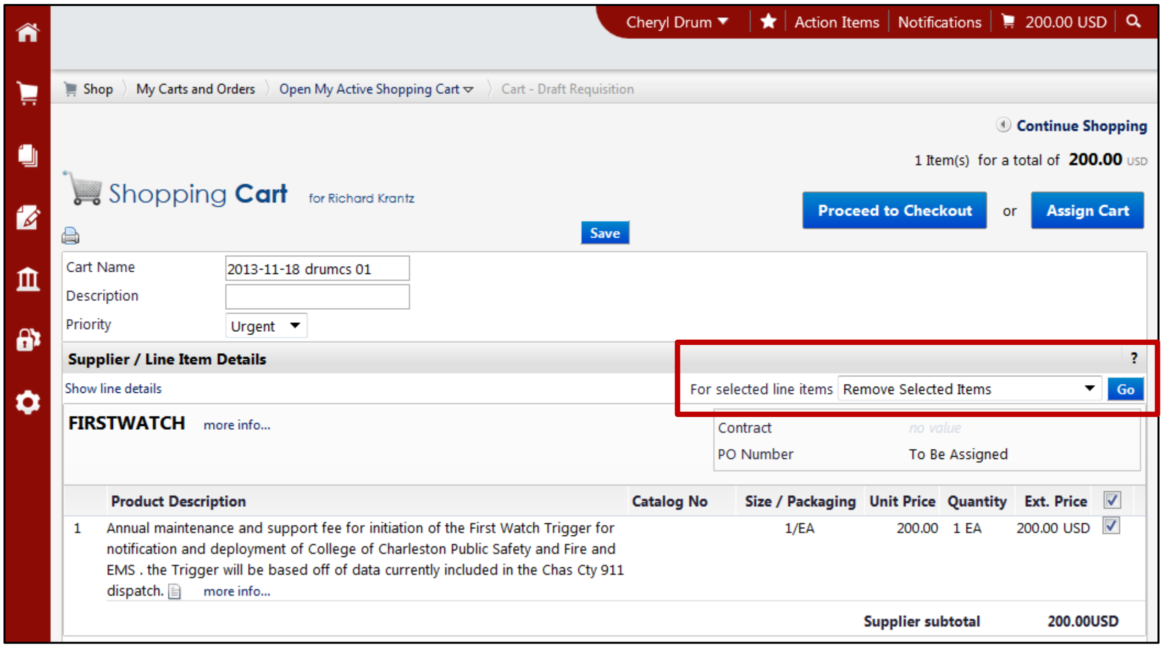


Managing Items in the Cart

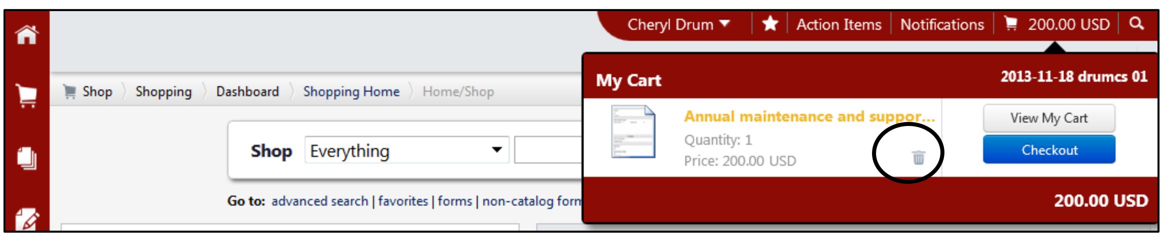
Occasionally, a user may need to delete or move items within a shopping cart. To do so, open up the shopping cart by clicking on the *Shopping Cart Name* hyperlink. (See screenshot next page)

Find the line(s) that need to be changed or deleted and place a check mark in the checkbox on the right-hand side of the line (red oval).

Next, select an option from the "For selected line items" drop-down menu. Once the desired action is selected, click on the *Go* button next to the drop-down menu for the request to process (red rectangle).



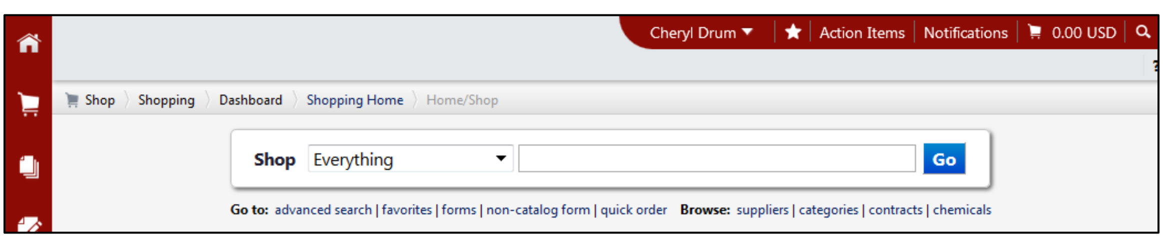
Alternately, if only deleting items from the active shopping cart, the user can click on the active cart icon at the top-right hand corner of the home/shop page.



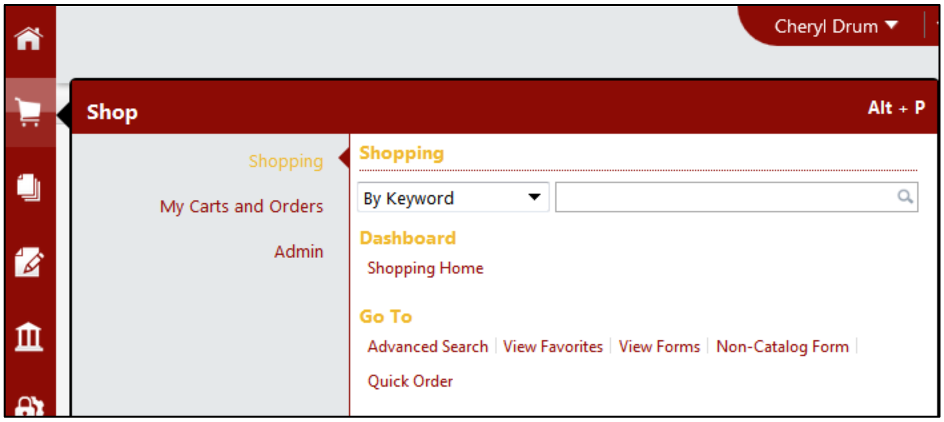
From this screen, click on the trash can icon (black circle) next to the item to be deleted. Also, from this screen, the user can proceed to the check-out process or view the shopping cart.

Favorites

Favorites are shortcuts to frequently used items or forms. The user's favorites can be accessed through the *favorites* link below the Shop search field on the home/shop page.



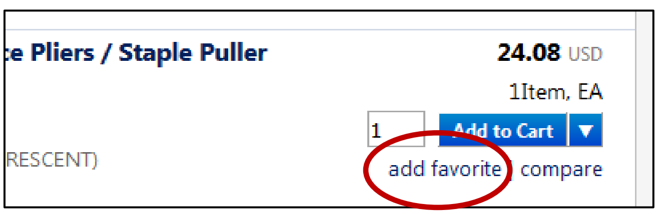
Or, click on the *Shopping Cart* icon. Select *View Favorites* from the *Go To* sub-menu.



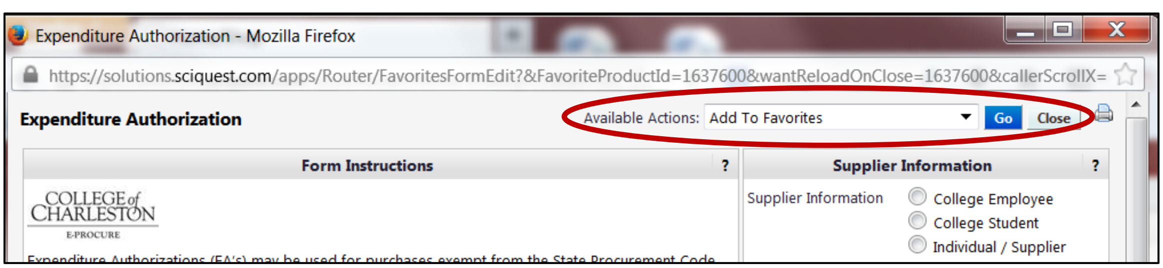
The following types of items or requests can be saved as favorites:

- Hosted items
- Punch-out Items (limited, few suppliers support this feature)
- Non-Catalog items
- Populated Forms (such as an Expenditure Authorization)

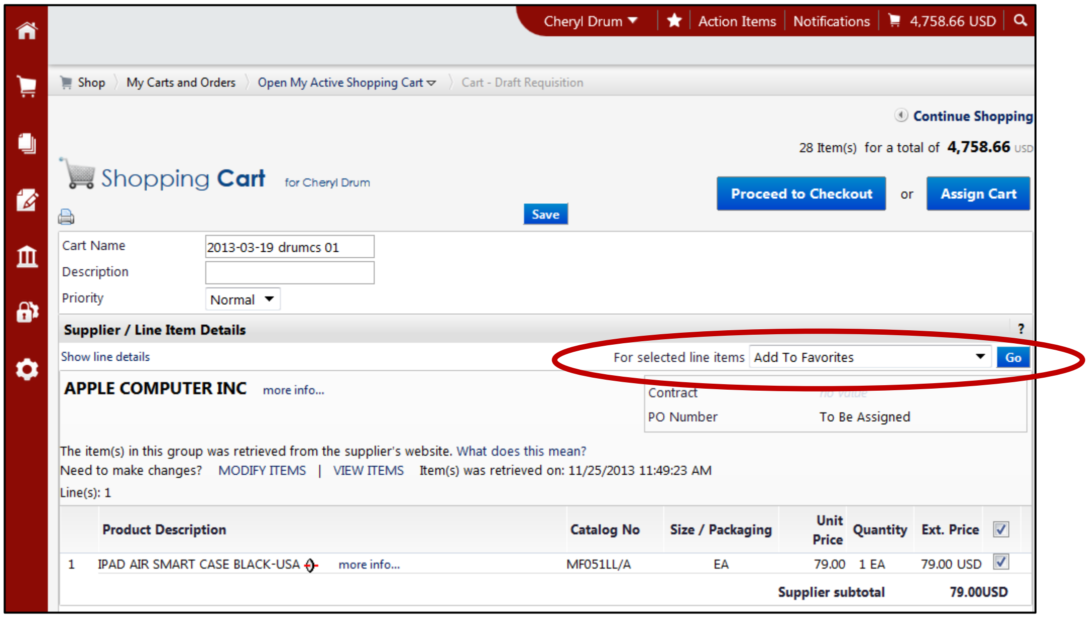
There are multiple ways offered throughout eProcure to add an item to the favorites list. See the following screenshots for examples of these options. From the search results:



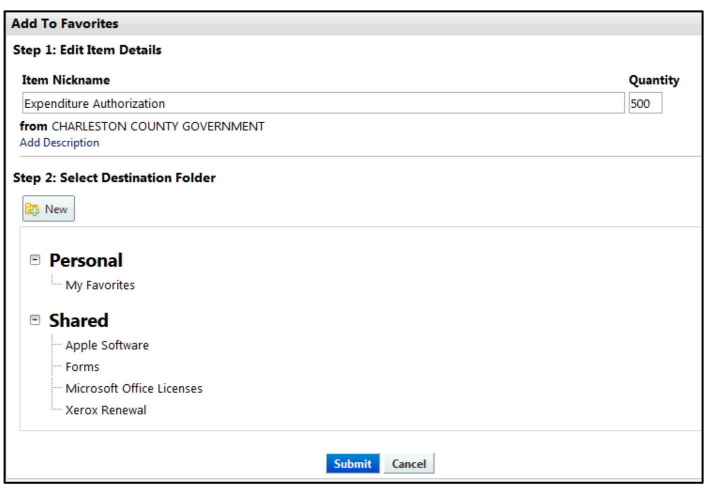
From a form:



Within the shopping cart:



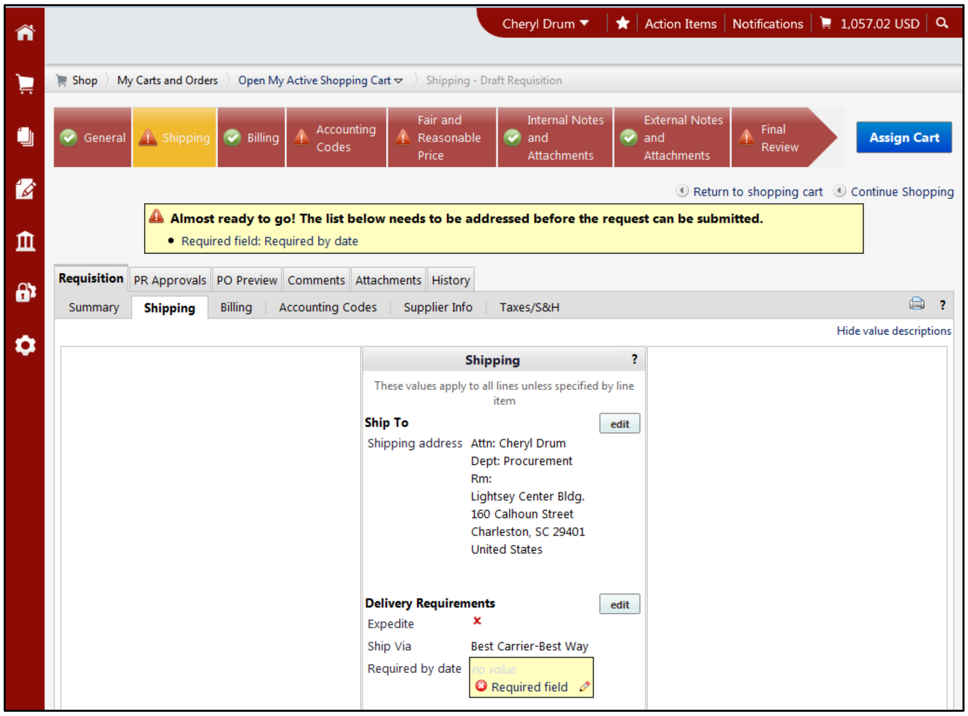
Using any of these options will launch a new window which asks the user to specify a nickname for the item and a destination folder. If a personal folder is not already set-up, click on the *New* button and follow the prompts.



Checking Out

Once all desired goods and services are added to the cart, it is ready to be submitted to become an order. **If a user has <u>only</u> Shopper permissions, the cart must be assigned to a Requisitioner to submit the cart for ordering.**

To begin, open the active cart and click on the *Proceed to Checkout* button. This will bring the user to the following screen:



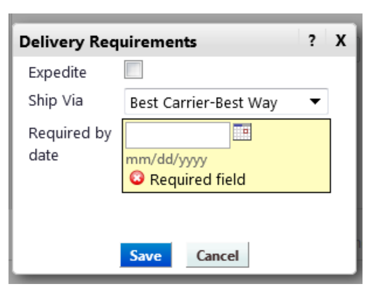
The green progress arrow bar on the top alerts the user to any incomplete information in the order. The symbol means that there is a required field that is missing. Once all fields have been completed, the warning will change to a symbol, indicating that the user is clear to proceed.

Shipping Information

In the above screenshot, the Shipping information and Accounting Codes need to be added before the order can be submitted. To edit the Shipping information, click on the Shipping area of the progress arrow. Click on the blue *edit* button or and follow the prompts to change this address. Please note that eProcure will default to the user's ship-to location created in the user's profile and the attention message regarding the ship-to location will not be generated.

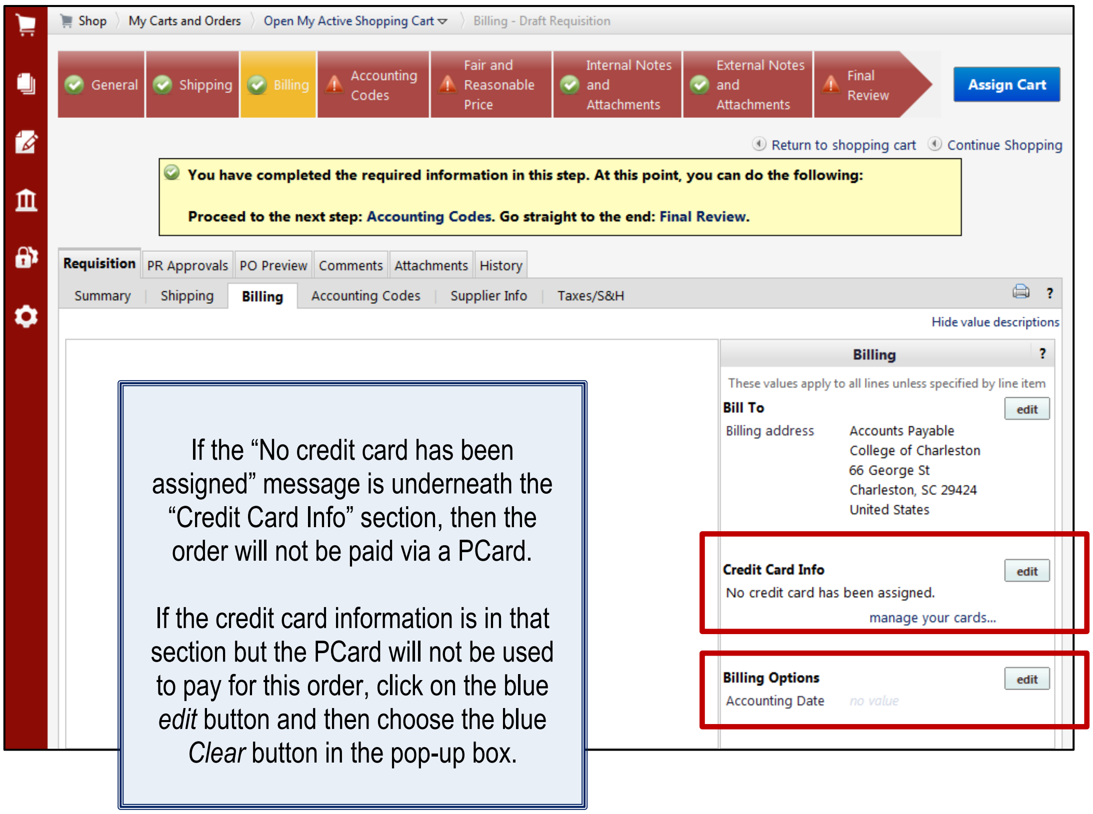
Do not forget to change the ship-to location if not shipping it to the default address!

The delivery requirement is also a mandatory field. This is information that is sent to the supplier. Click on the blue *edit* button in the Delivery Requirements section of the Shipping box. Use the calendar next to the *Required by date* field to ensure accurate date formatting.

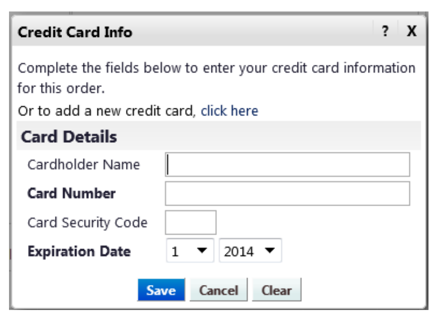


Billing

By default, eProcure is setup to pay for purchases through Accounts Payable via the use of a Purchase Order. However, a PCard can be used to pay for the purchase instead. To make this election, click on the Billing section of the progress bar.



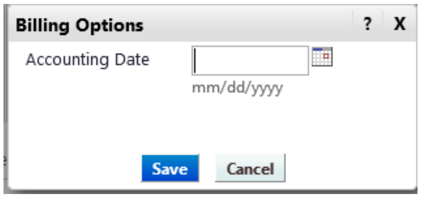
Click on the blue *edit* button next to “Credit Card Info”. eProcure allows the user to either enter a new credit card or to choose from a card already stored in the user’s profile.



Choosing a Fiscal Year

Click on the Billing section of the progress bar. To place an order against the next fiscal year, click on the blue *edit* button next to *Billing Options (see above screenshot).*

A pop-up box will appear that allows the user to choose an "Accounting Date."

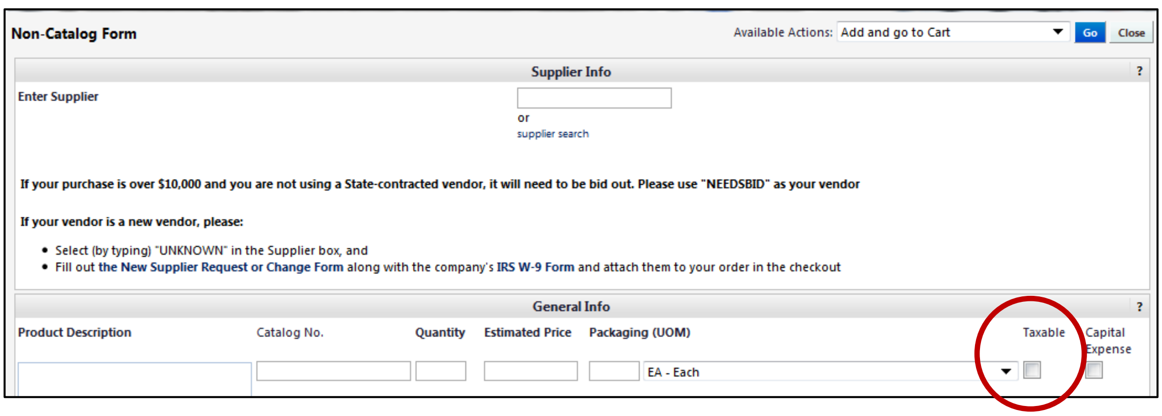


Anything after June 30th of the current fiscal year will set the order to be paid from the next fiscal year's budget.

Please note that it is not necessary to fill in this information for orders being paid from the current fiscal year's budget, only the next fiscal year.

Sales Tax

eProcure will add sales tax to shopping carts containing items from hosted and punch-out catalogs. If creating the shopping cart using the Non-Catalog Form, check the "Taxable" checkbox if purchasing goods or equipment.

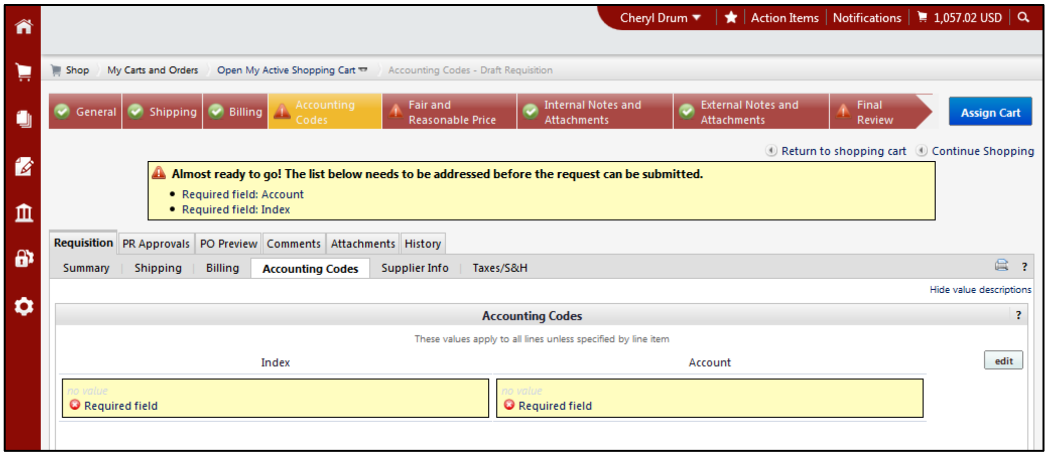


Accounting Codes

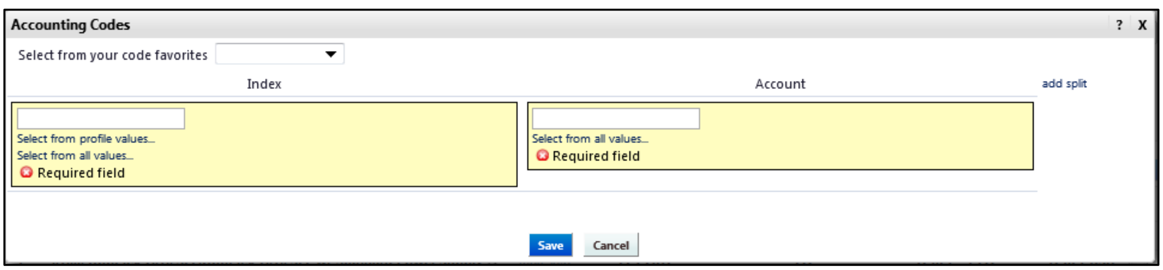
Accounting codes must be completed for every order.

There are two fields in the Accounting Codes section, Index and Account.

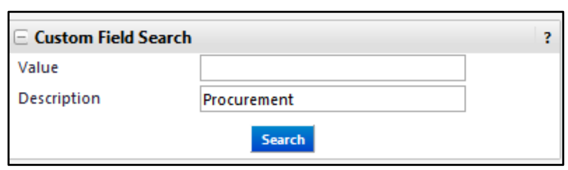
- **Index** is the **fund** number the order is charged against
- **Account** is the broad **expense** category describes the good or service



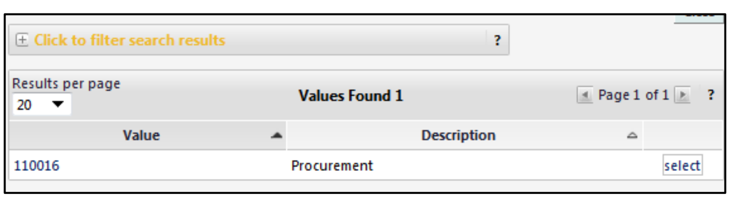
Click on the blue edit button to enter the index and account numbers. If the number is unknown, the user can search for this information either by number or by the alpha description. Click on the *Select from all values* link to start the search.



Type the description of the index in the field and click the blue Search button.



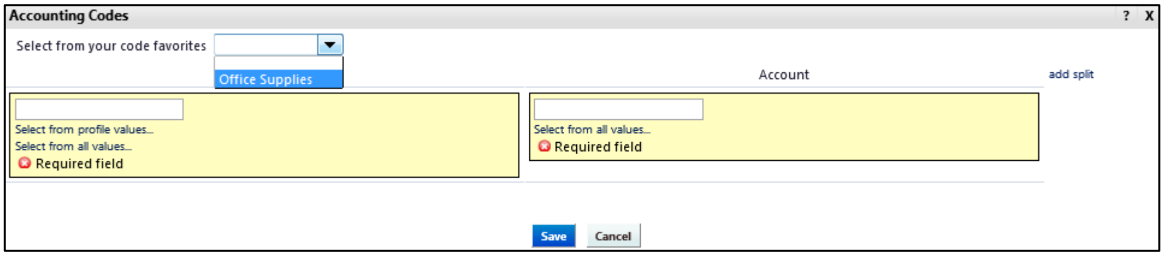
View the results and select the correct index.
This will automatically populate the field with the user's selection.



Be sure to click the *Save* button when finished!

It is possible for a user to save index-account code combinations in their profile. These combinations can be given a nick-name. During the check-out process, the user can select the appropriate combination from the code favorite's drop-down menu. This will populate both the index and the account code.

This will not work for all purchases, but will save time for those frequent purchases.

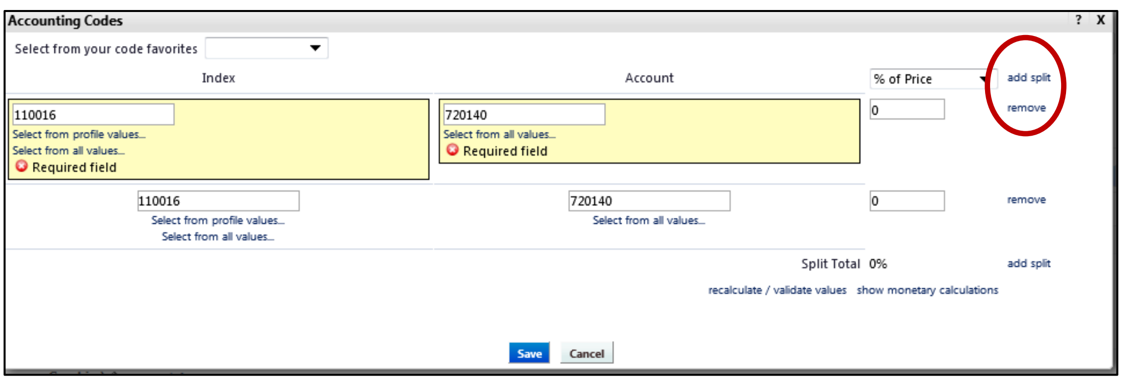


Splitting Orders

It is possible to split an order between different indexes, either per order or per line item.

> *Splitting an order between indexes requires that the cart be assigned to a buyer in the Procurement Office instead of placing the order; otherwise the order will reject.*

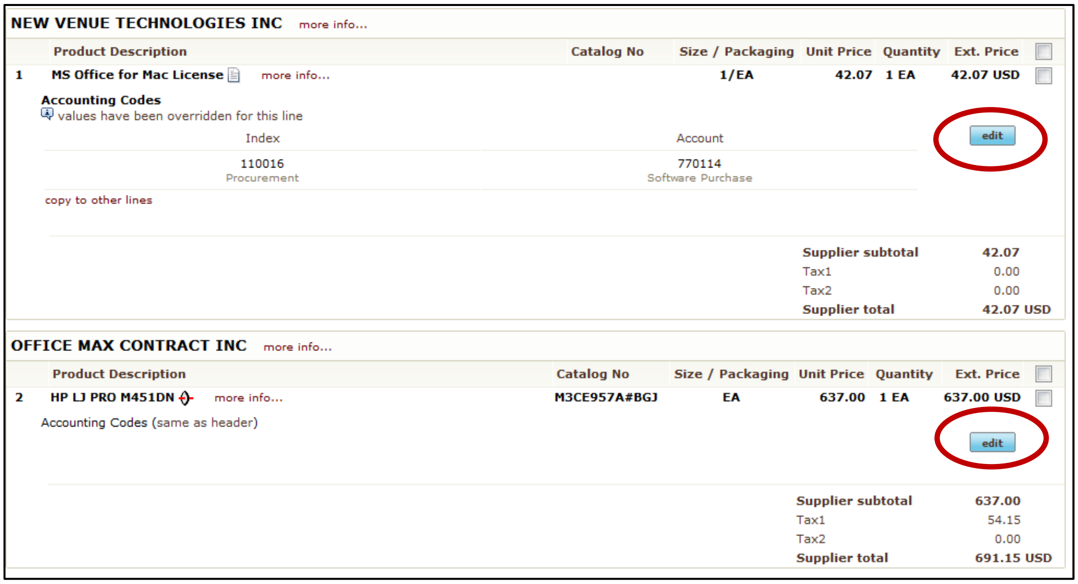
To add an accounting code split for the whole order, click on the *add split* link in the Accounting Codes pop-up window:



This will add an additional line that will allow the user to change both the Index and the Account. Orders can be split by percentage of the subtotal of the order, percentage of the quantity of the order or by a specific dollar amount. The drop-down menu to the left of the *add split* link dictates how the split will be applied.

Please note that when adding a per-order accounting code split, that a per item accounting code split cannot also be added.

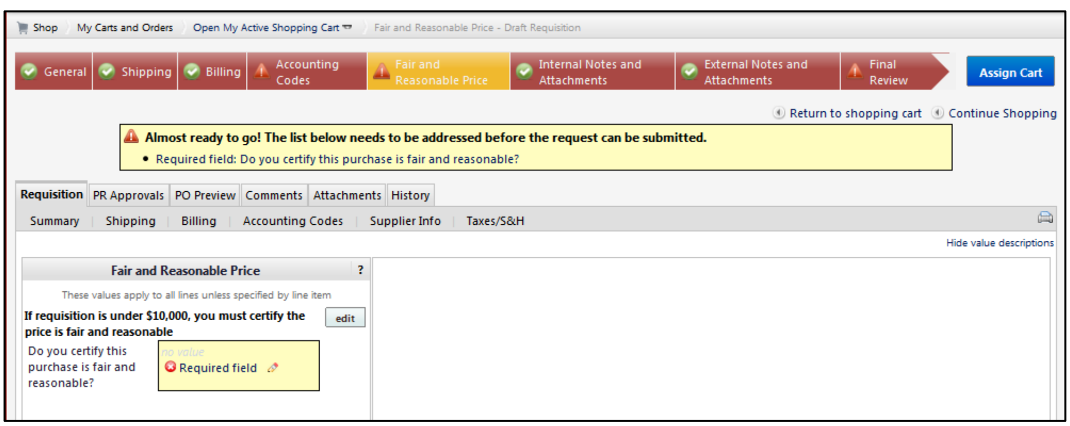
To split accounting codes per item, scroll down to the "Supplier/Line Item Details" section and click on the blue *edit* button next to the item that needs specific accounting codes.



Change the accounting codes in the subsequent pop-up box. Note that it is possible to split the accounting codes within a single item as well. To do so, click on the *add split* link and follow the same procedure as above.

Fair & Reasonable Price

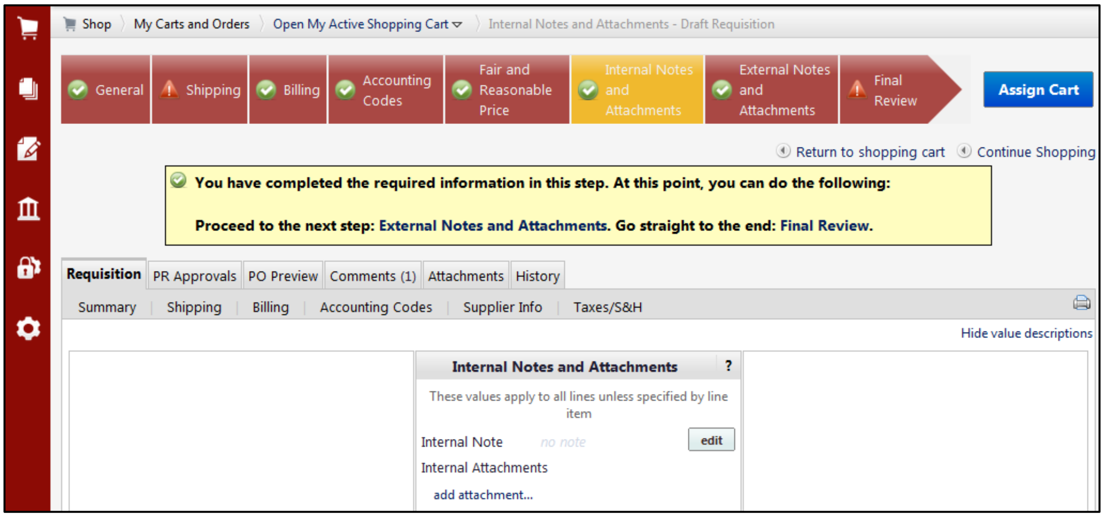
SC Procurement Laws state that purchases up to $10,000 must be deemed and certified "fair and reasonable" by the purchaser. This certification must be made on every order in eProcure.



To make this certification in eProcure, answer yes/no using the dropdown box on the Fair and Reasonable screen:

Internal / External Notes and Attachments

Both the Notes and Attachment screens allow input of a personalized note or attachment of a file (such as a PDF, an Excel spreadsheet, etc.). Like it sounds, Internal Notes and Attachments can only be viewed internally at the College, however External Notes and Attachments will be sent to the supplier.

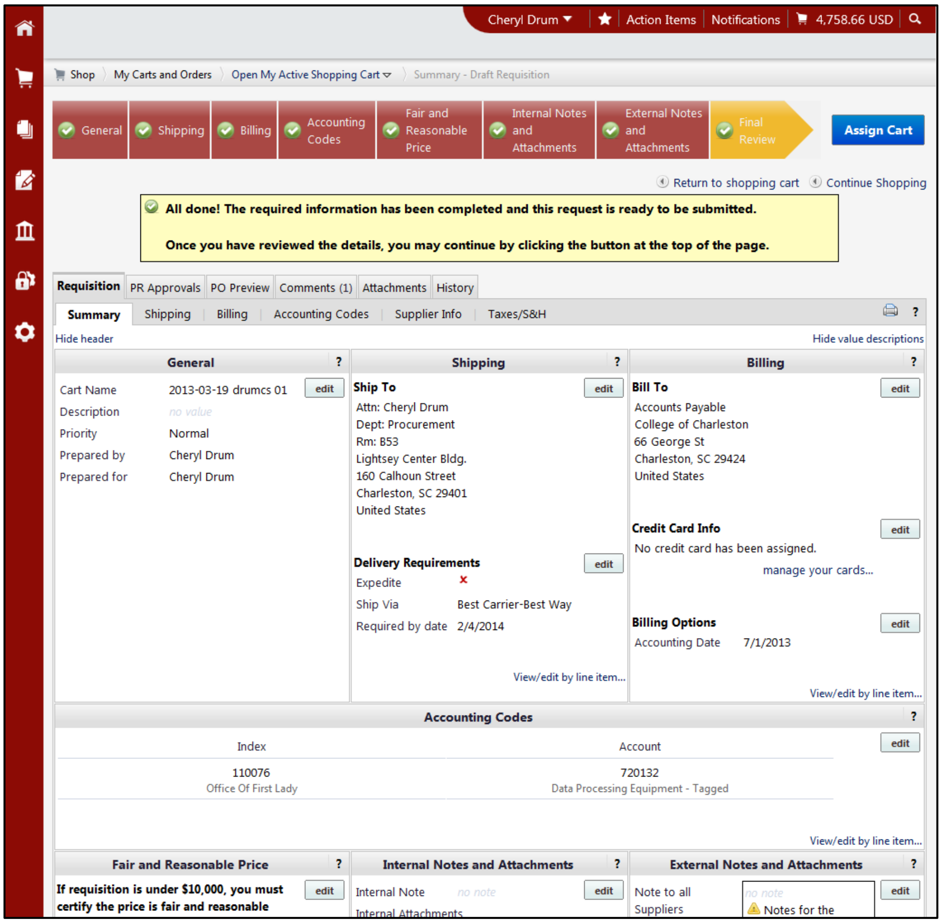


*External Notes and Attachments are seen by the supplier **only** when ordering Non-Catalog items. Hosted and Punch-out Suppliers **cannot receive** external notes or attachments.*

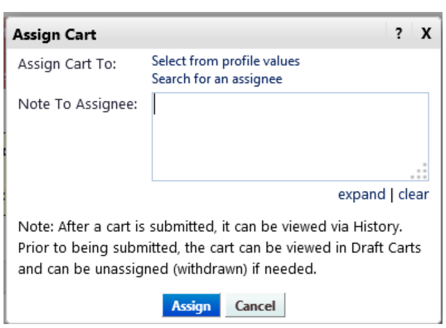
Final Review

Once every section in the progress bar is complete, the last step is to review the *Final Review* screen to ensure all of the order information is complete and accurate. It is at this step that a cart may either be assigned to or be submitted for ordering by a Requisitioner.

To submit the cart, click on the blue *Place Order* button (see screenshot next page).



If the *Place Order* button is not visible, the user is not a requisitioner and must assign the cart in order for it to become a requisition and eventually a purchase order. Click on the *Assign Cart* button to assign the cart to a Requisitioner. This action will open a pop-up window, allowing the user to choose another employee who has the role of Requisitioner and assign the cart to them.



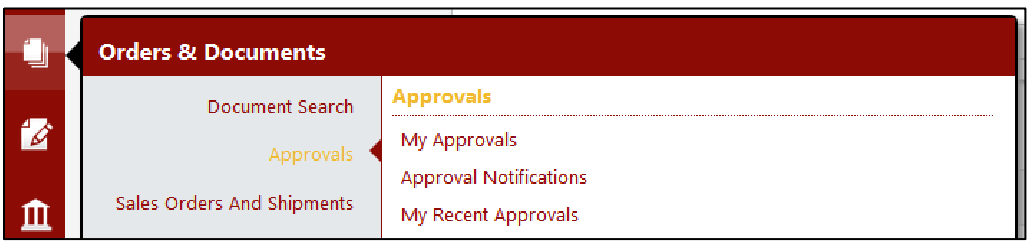
From this window, search for the desired assignee or select from a previously added list of Cart Assignees (this list can be created in the user's profile settings). A note to the assignee can be added at this screen as well. Click on the *Assign* button to send the cart to the Requisitioner for approval. The Requisitioner will receive an email notification that a cart has been assigned and is awaiting action.

Approving

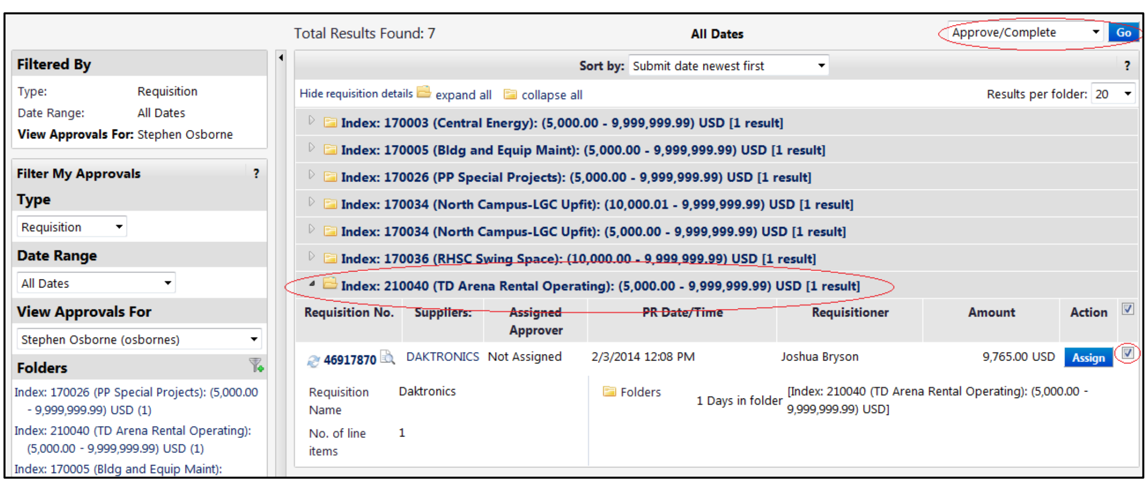
Requisitioners and Approvers will need to approve orders from time to time. eProcure is set-up so that when an approval is required; an automated email is generated and sent to all available approvers. There are two ways to access pending approvals after logging into eProcure.

The first step is to go to the Action Items box, which is located on the top right-hand section of the main page next to your user name. Clicking on the *Action Items* link in this box will expand the menu, showing everything that is waiting for the user's attention.

The other way to access approvals is via the *Orders & Documents menu* from the Main navigation bar. Select *Approvals* and then *My Approvals* from the menu.



Clicking on either the navigation bar or the *Action Items* link will bring you to a page that looks like the following screenshot:

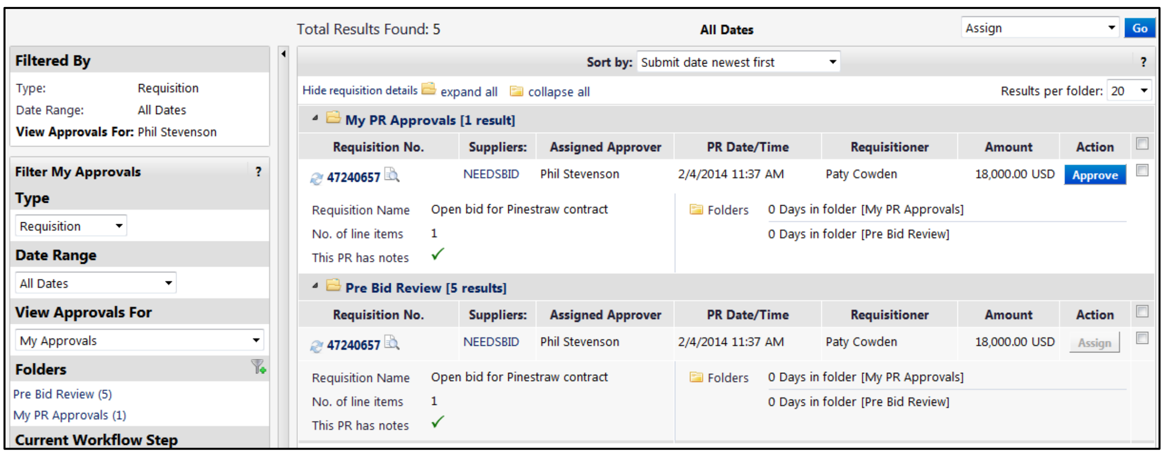


To approve an order that does not need any modification:

1. Expand the shared workflow folder by clicking on the folder name. In the above screenshot, the folder entitled “Index: 210040 (TD Arena Rental Operating): (5,000 – 9,999,999.99) USD” is opened.
2. In the expanded folder, orders that need your approval or that can be assigned to someone (including yourself – see the My PR Approvals section below) appear. Tick the checkbox next to the requisition(s) to be approved.
3. Choose “Approve/Complete” from the drop-down menu and click on the *Go* button.

My PR Approvals

Approval folders in eProcure are usually shared among several approvers. It is possible to approve an order directly from the shared folder – as the above directions show how – but it is also possible to assign an order directly to someone. When that occurs, only that person can approve the order, and the order will show in both the shared workflow folder and also in the assignee’s personal folder - “My PR Approvals”.

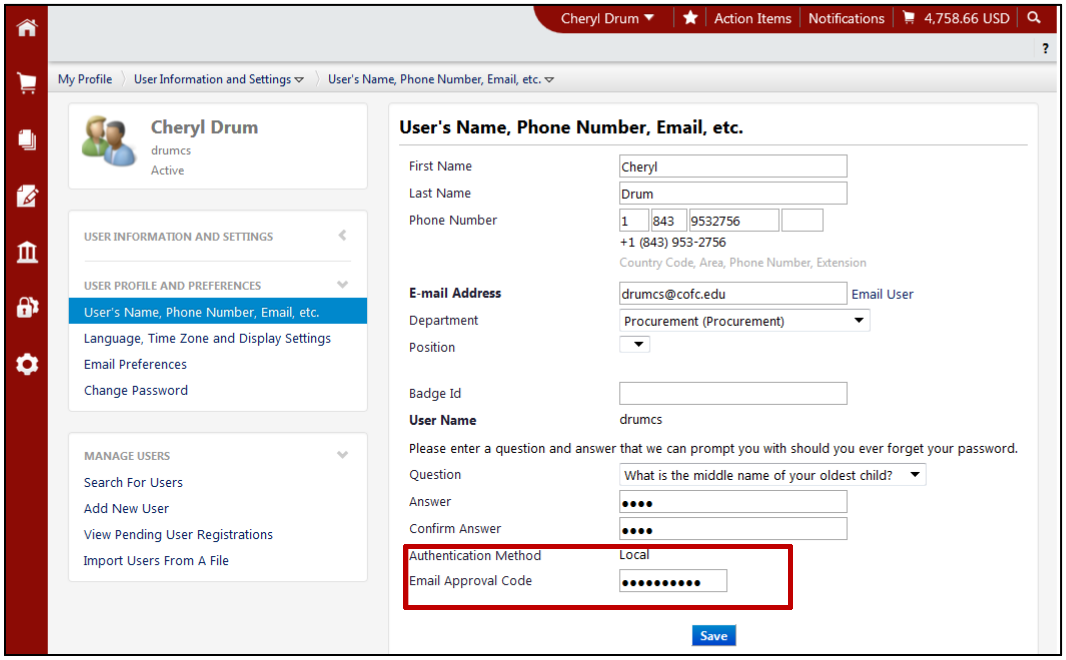


Clicking on the blue *Assign* button in a shared workflow folder assigns that order to the user’s own “My PR Approvals” folder. From there, click on the blue *Approve* button to approve it. This accomplishes the same thing as approving it directly from the shared folder as shown above.

The order can also be assigned to someone else by ticking the checkbox next to the order and using the “Assign” option from the drop-down menu. To un-assign an order from “My PR Approvals”, tick the checkbox next to the order and choose “Return to Shared Folder” from the drop-down menu. Click the blue *Go* button to complete the action.

Approving Via Email

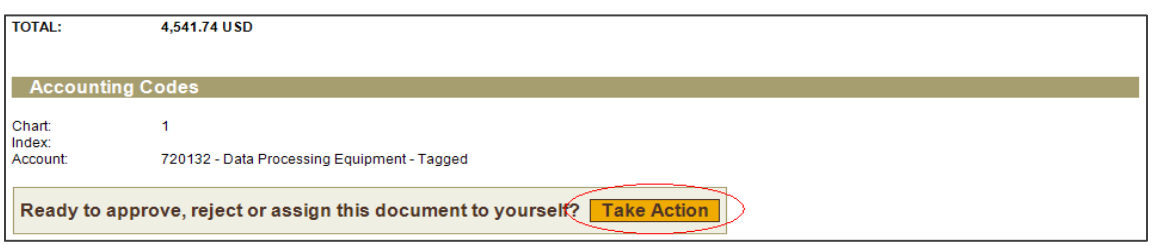
It is also possible to approve orders via an email order approval notice. This is a secure, fast and easy way to approve orders - even from off-campus. Users with approval authority can enable this feature by first navigating to their user profile. Then select the *User's Name, Phone Number, Email, etc.* from the *User Information and Settings* menu.



Be sure to click the *Save* button when finished!

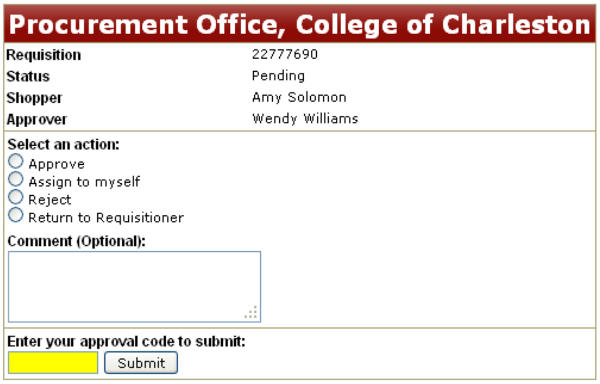
> *The approval code must be at least six characters long.*

A *Take Action* button will now appear within the approval email.



Click on this button to open a secure website that will offer the following options:

- approve,
- reject, or
- return the order to the requisitioner

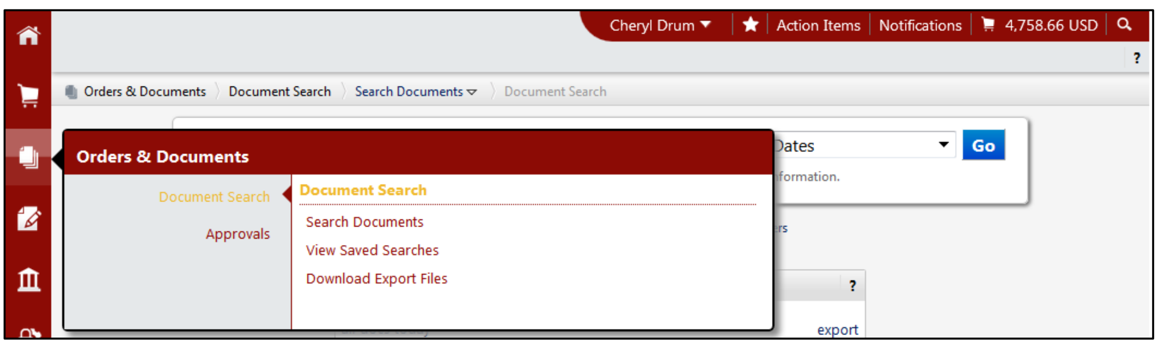


Enter any comments on this order in the comment field. This is especially useful when an order is rejected or returned to the requisitioner. After choosing the appropriate action, the user will enter their unique approval code and click the *Submit* button.

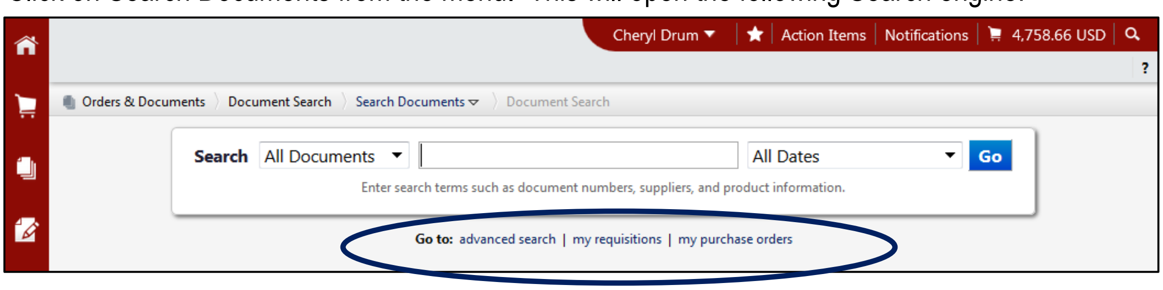
eProcure will generate one more confirmation pop-up box. After this box is answered, the approval process is complete!

Document Search

The *Orders & Documents* menu will open up a search menu to search for requisitions and purchase orders. Searching this way is fast, flexible and can be customized. Click on the *Document* icon in the left navigation bar.

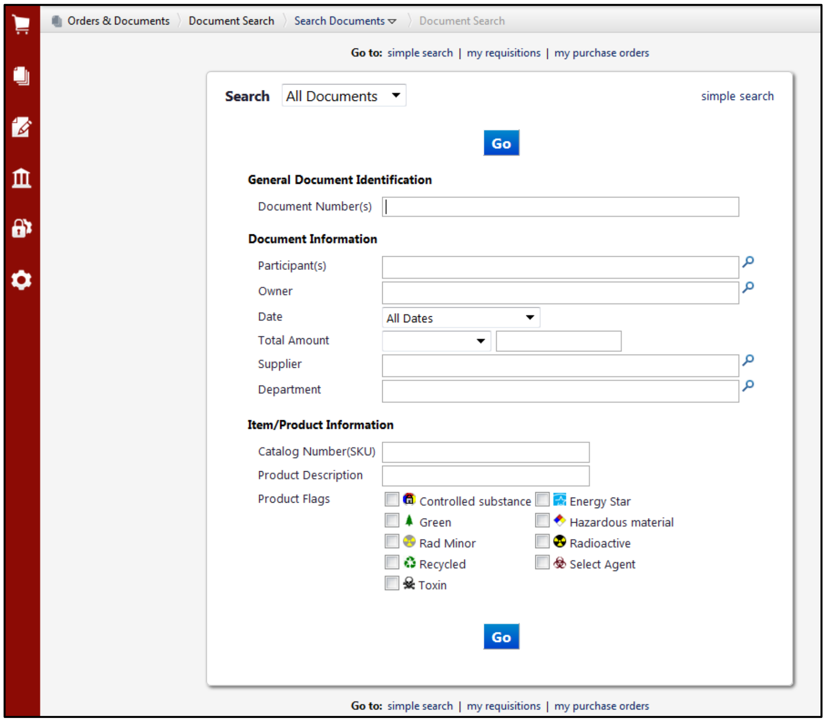


Click on Search Documents from the menu. This will open the following Search engine:



Located below the search box are links to ***my requisitions*** and ***my purchase orders***. Clicking on these links is the fastest way to find a user's orders from the last 90 days. The default search box is pictured above and it offers a few options in the drop-down menus.

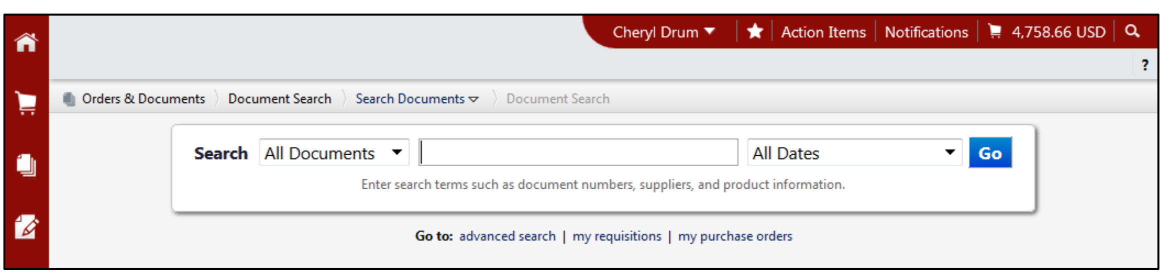
If these options are not specific enough, conduct an *advanced search* by clicking the link in the *Go To* links. Pick from any option listed or combine multiple search criteria.



Receiving Orders

eProcure will send out an automated reminder email after the order is complete stating that a receipt is required once it has arrived (or services have been rendered). A receipt must be created in eProcure when goods/services are received.

First, locate the purchase order by clicking on the *Document Search* tab, then *my purchase orders* or by searching for the purchase order(s).

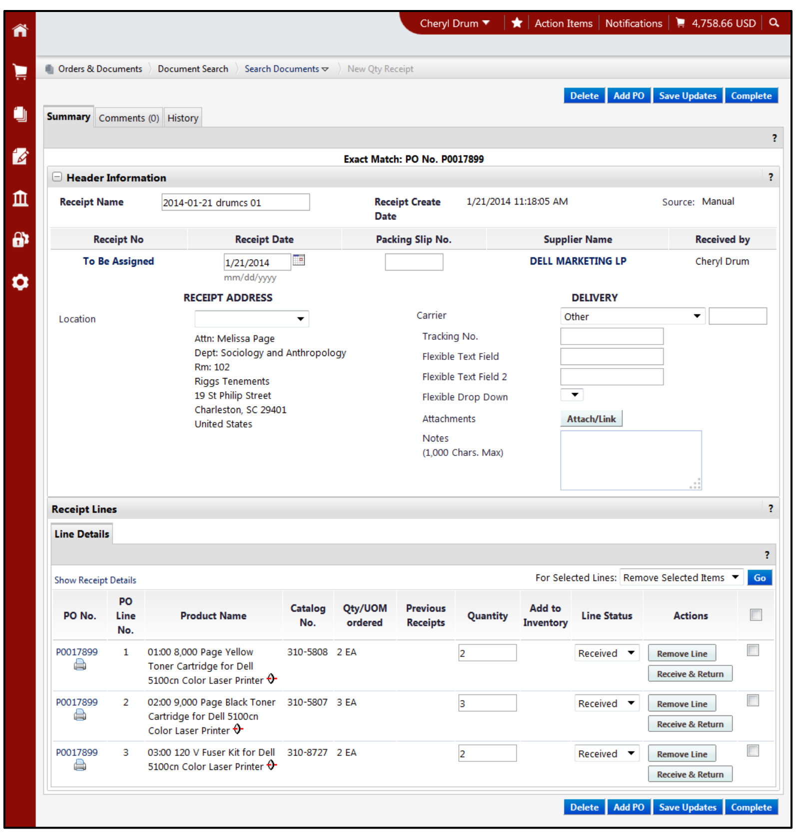


Once the appropriate purchase order is identified, select the check box next to the purchase order total. Then, open the drop-down menu above the search results and select either "Create Quantity Receipt" or "Create Cost Receipt."

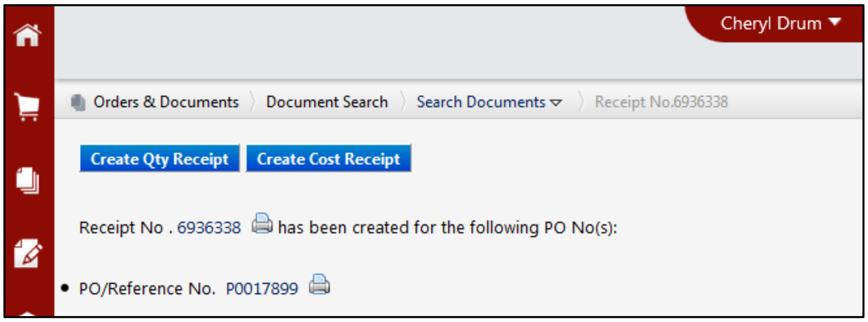
Create a *Quantity Receipt* for tangible goods and a *Cost Receipt* for services. In the above example, the Quantity Receipt is selected. Click the *Go* button to open the receipt box.

On this screen, complete any relevant information regarding the order under the *Receipt Summary* section (*Header Information* section is optional). Refer to the screenshot below. If all items were received as ordered, simply click on the *Complete* button.

If only part of the order was received, create a partial receipt by entering the actual quantity of items that were delivered. Create another receipt(s) for subsequent deliveries until the purchase order is fully received.



Please note that an item can also be marked as *Returned* or *Cancelled*, if applicable. When finished, click on the C*omplete* button and a screen similar to the one below will appear. This is the final screen in the creating receipts process.

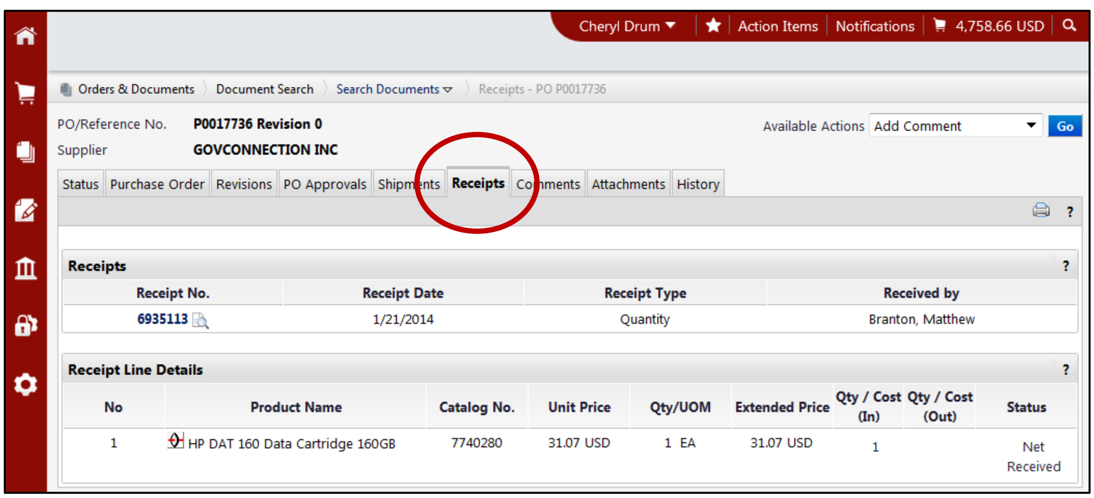


Do not create a receipt for orders paid with a PCard or received at Central Warehouse.

Correcting Receipts

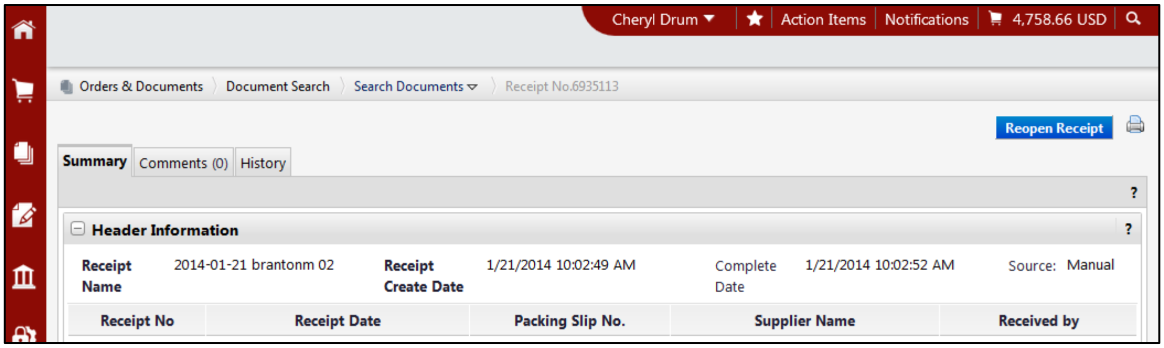
On occasion, it may be necessary to modify a receipt to correct inaccuracies. To make corrections to an existing receipt, first search for, locate and open the Purchase Order using the methods listed in the above section, *Document Search*.

Locate the *Receipts* tab within the purchase order:

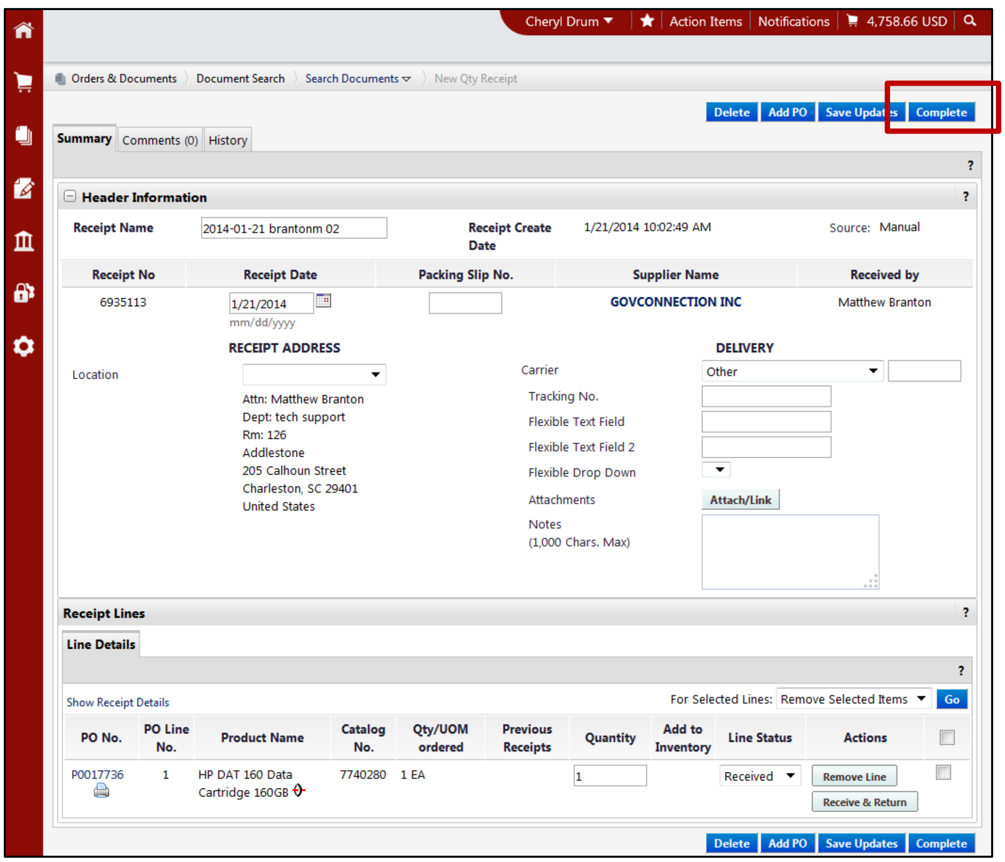


The "Receipt No.", the date it was created, the type of receipt and finally who received the order will be visible. To modify the receipt, click on the Receipt No. This will open up the receipt.

Click on the *Reopen Receipt* button to make changes.



eProcure will prompt the user to verify the reopening of the receipt. Answer "Ok", and supply the reason for modifying the receipt in the comment box, i.e. over received. The receipt reopens for editing, see screenshot below.

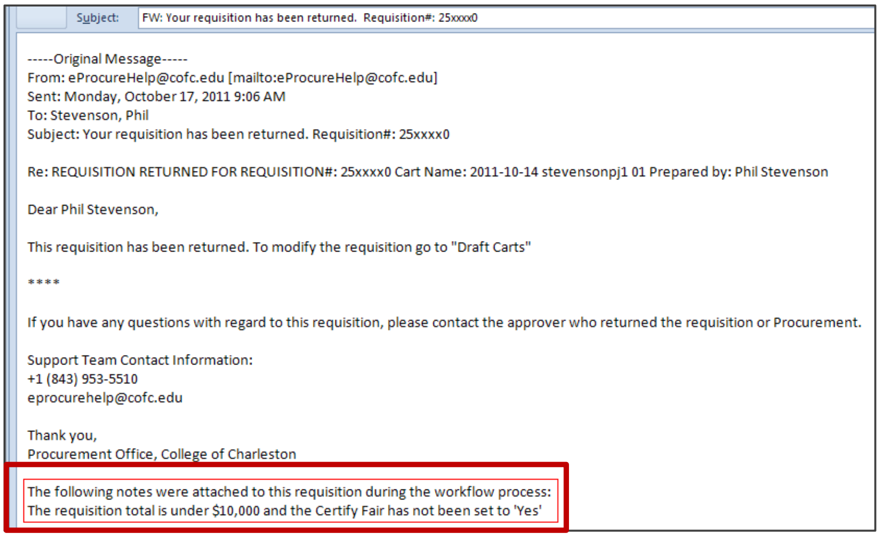


Change the receipt to modify the line items that have already been received been received, remove line item(s) or delete the receipt altogether by clicking on the *Delete* button on either the top or bottom of the screen.

The *Save Updates* button will save any changes within this screen, but in order for the edits to be submitted, the user must click on the *Complete* button!

Your Requisition has been Returned

Occasionally, the user will receive an email stating that their requisition has been returned. This could happen for a variety of reasons – incorrect Accounting Codes being the most common reason. The email will describe the problem. Look for a section at the bottom of the email that begins with "The following notes were attached to this requisition during the workflow process."



Subject: FW: Your requisition has been returned. Requisition#: 25xxxx0

-----Original Message-----
From: eProcureHelp@cofc.edu [mailto:eProcureHelp@cofc.edu]
Sent: Monday, October 17, 2011 9:06 AM
To: Stevenson, Phil
Subject: Your requisition has been returned. Requisition#: 25xxxx0

Re: REQUISITION RETURNED FOR REQUISITION#: 25xxxx0 Cart Name: 2011-10-14 stevensonpj1 01 Prepared by: Phil Stevenson

Dear Phil Stevenson,

This requisition has been returned. To modify the requisition go to "Draft Carts"

****

If you have any questions with regard to this requisition, please contact the approver who returned the requisition or Procurement.

Support Team Contact Information:
+1 (843) 953-5510
eprocurehelp@cofc.edu

Thank you,
Procurement Office, College of Charleston

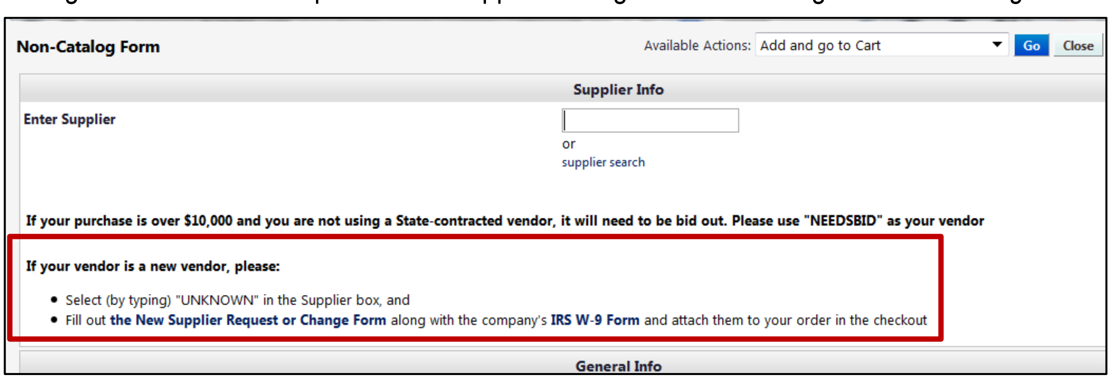
The following notes were attached to this requisition during the workflow process:
The requisition total is under $10,000 and the Certify Fair has not been set to 'Yes'

The reason that the requisition was returned will be in this section, as well as instructions on how to modify and successfully submit the order.

If an order is returned, the cart is returned to the user's draft shopping carts. The user should open the cart and proceed to the checkout process, correct the error and resubmit the shopping cart.

New Supplier Request or Change

Occasionally the supplier of the requested good/service may not have done prior business with the College of Charleston. Request a new supplier through eProcure using the *Non-Catalog* Form.



Non-Catalog Form Available Actions: Add and go to Cart Go Close

Supplier Info

Enter Supplier
or
supplier search

If your purchase is over $10,000 and you are not using a State-contracted vendor, it will need to be bid out. Please use "NEEDSBID" as your vendor

If your vendor is a new vendor, please:

- Select (by typing) "UNKNOWN" in the Supplier box, and
- Fill out **the New Supplier Request or Change Form** along with the company's **IRS W-9 Form** and attach them to your order in the checkout

General Info

In the *Non-Catalog* Form, there are links (red box in above screenshot) to the required forms. The *New Supplier Request or Change* Form is an Adobe form that allows the user to complete the required information fields, save the document and attach it to the order.

Attach a copy of the company's W-9 (the IRS W-9 form is required by State and Federal law) and the completed *New Supplier Request or Change* Form to the shopping cart during the checkout process (internal attachments). These forms are also available on the Office of Procurement's website.

> Avoid Delays!
> If the completed W-9 and New Supplier Form are not attached to the order, it will stop in Procurement until they are received and processed.

Placing an Order with the New Supplier

Even if the *New Supplier Request or Change* Form is attached to the order, it is still possible to place the order normally without having to wait for the new vendor to be set-up. To do so select the vendor named, "UNKNOWN", on the Non-Catalog Form. This is a temporary placeholder until the new vendor is set-up in both Banner and eProcure.

From here, fill out the form following normal procedures. Once the Office of Procurement has added the supplier, the order will be modified to show the new supplier and sent on through the approval process to create the requisition and subsequent purchase order.

Only select the "UNKNOWN" vendor when requesting a new supplier. Selecting this option any other time will cause the order to fail.

Showcased Services

The Office of Procurement has added frequently used services to this centralized area on the home/shop page.

Business Card Express and Enterprise Rent-A-Car services contain additional information to place an order. Also included is the link to their website.

Xerox Renewal Form is used yearly to renew the contract for departmental Xerox multi-functional printers. This form is a template that should be used to ensure the proper information is captured and the purchase order can be processed. The College has a combined bill for the entire campus. There will only be one purchase order issued. Submitting this request will simply provide approval for the funds to be spent

Apple OS X Mountain Lion License. Use this pre-populated Non-Catalog Form to order a new license. Simply add it to a shopping cart, complete the check-out process, and place the order.

Expenditure Authorization

This is the electronic version of the form on the Controller's website. Complete all required fields and attach all required documents to this form. This may include, IRS Form W-9, New Supplier Request/Change Form, signed registration form, etc.

When all fields are completed, add this form to an <u>empty</u> shopping cart. Take the shopping cart through the check-out process and place the order. After the necessary approvals have been secured (electronically), the requisition will be sent to the Controller's Office for final processing.

PO Change Request

Occasionally, a purchase order needs to be modified after the purchase order number has been assigned and the sent to the vendor. Use the PO Change Request form to:

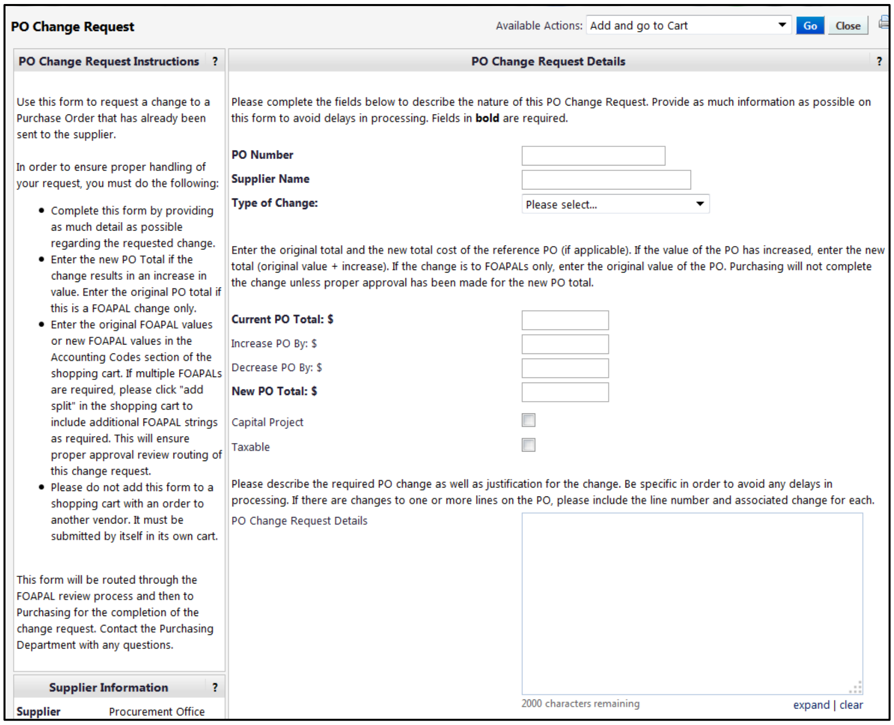
- Increase/decrease the purchase order amount
- Add or delete line items
- Cancel the purchase order in its entirety
- Change accounting codes (index/account numbers)

The form can be found on the Home/Shop page under *Showcased Services.*

Complete the required fields (bold), add the form to an <u>empty cart</u>, and take the shopping cart through the check-out process similar to a normal purchase.

Upon electronic receipt of this request, a Procurement Officer will make the necessary changes to the purchase order. eProcure will generate a new requisition number for this shopping cart, but the changes to the purchase order can be found under the revisions tab in the original purchase order. Also, a receipt can only be created for the original purchase order and not for any subsequent changes. The Procurement Officer will request that these changes be "received" in Banner.

See the screenshot on the following page for an example of how the form looks.

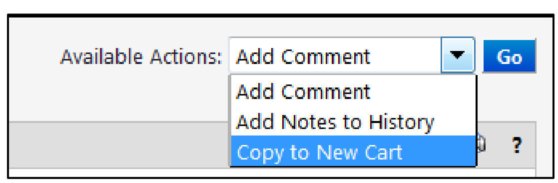


Helpful Tips and Tricks

Copying Orders

It is possible to duplicate a previously placed order. This can be a real time saver! First find the <u>requisition</u>. Click on the *Orders & Documents* menu in the navigation bar and select *Search Documents* from the list. Enter the requisition number in the search field and click *Go*. If the requisition number is unavailable, search for the purchase order and open it. The requisition number is hyper-linked on the first tab of the purchase order.

From the *Requisition* tab within the requisition is an "Available Actions" drop-down menu (right side of the screen).

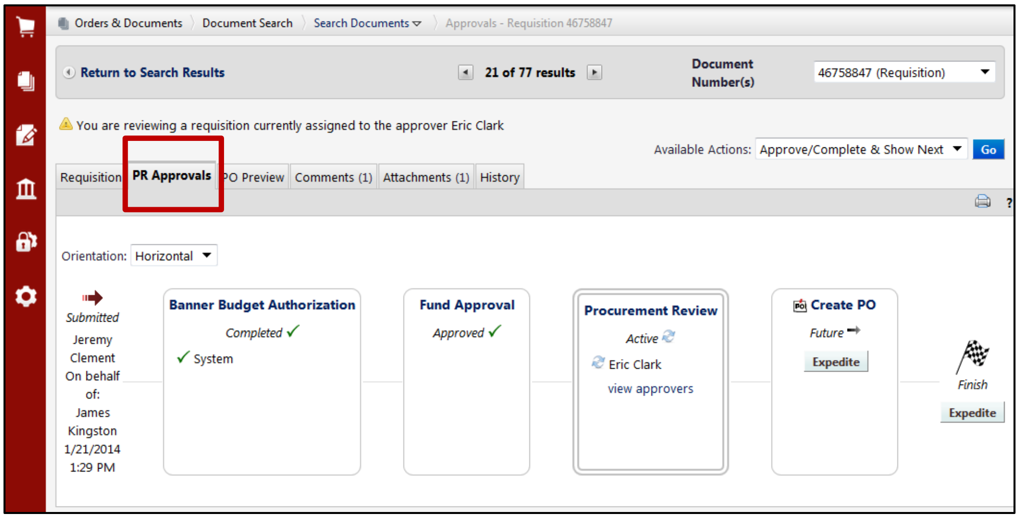


Choose "Copy to New Cart" from this menu and click on the *Go* button. Everything in that requisition will be copied to a new shopping cart (including any attachments) and placed into the user's Draft Carts.

Be sure to make any necessary changes to the new cart before submitting it for order!

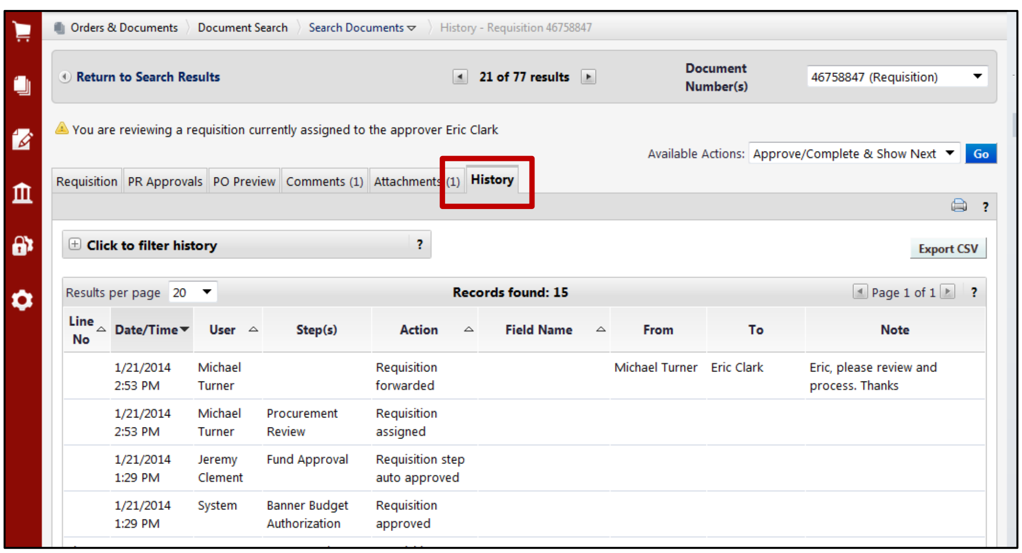
Purchase Requisition (PR) Approvals Tab

Within a requisition there is a *PR Approvals* tab.



Click on the tab for a visual illustration of where a requisition is in the approval process (see above screenshot). In the above example, the fund expenditure for this requisition was approved and it is currently awaiting the next approval step (Procurement Review).

Alternately, view a historical accounting of the life of the requisition by clicking on the *History* sub-tab.



eProcure Cheat Sheets

Commodity Families

Apparel/Luggage/Personal Care Products	53xxxxxx
Building/Construction Machinery & Accessories	22xxxxxx
Building/Construction Maintenance Services	72xxxxxx
Chemicals including Bio-Chemicals & Gas Materials	12xxxxxx
Cleaning Equipment & Supplies	47xxxxxx
Commercial/Military/Private Vehicles & Accessories/Components	25xxxxxx
Communications/Computer Equipment/Peripherals, Components & Supplies	43xxxxxx
Defense/Law Enforcement/Security/Safety Equipment & Supplies	46xxxxxx
Distribution/Conditioning Systems Equipment & Components	40xxxxxx
Domestic Appliances/Consumer Electronic Products & Supplies	52xxxxxx
Drugs/Pharmaceutical Products	51xxxxxx
Editorial/Design/Graphic & Fine Art Services	82xxxxxx
Education/Training Services	86xxxxxx
Electronic Components & Supplies	32xxxxxx
Engineering/Research/Technology Based Services	81xxxxxx
Environmental Services	77xxxxxx
Farming/Fishing/Forestry/Wildlife Contracting Services	70xxxxxx
Farming/Fishing/Forestry/Wildlife Machinery & Accessories	21xxxxxx
Financial/Insurance Services	84xxxxxx
Food/Beverage/Tobacco Products	50xxxxxx
Fuels/Fuel Additives/Lubricants & Anti-Corrosive Materials	15xxxxxx
Furniture & Furnishings	56xxxxxx
Healthcare Services	85xxxxxx
Industrial Cleaning Services	76xxxxxx
Industrial Manufacturing & Processing Machinery & Accessories	23xxxxxx
Industrial Production & Manufacturing Services	73xxxxxx
Laboratory/Measuring/Observing/Testing Equipment	41xxxxxx
Lighting/Electrical Accessories & Supplies	39xxxxxx
Live Plant & Animal Material & Accessories and Supplies	10xxxxxx
Management/Business Professionals/Administrative Services	80xxxxxx
Manufacturing Components & Supplies	31xxxxxx
Material Handling/Conditioning/Storage Machinery Accessories & Supplies	24xxxxxx
Medical Equipment, Accessories & Supplies	42xxxxxx
Mineral/Textile/Inedible Plant/Animal Materials	11xxxxxx
Mining Machinery & Accessories	20xxxxxx
Mining/Oil/Gas Drilling Services	71xxxxxx
Musical Instruments/Games/Toys/Arts & Crafts/Educ. Equip, Accessories & Supplies	60xxxxxx

National Defense/Public Order/Security & Safety Services	92xxxxxx
Office Equipment, Accessories & Supplies	44xxxxxx
Organizations/Clubs	94xxxxxx
Paper Materials & Products	14xxxxxx
Personal/Domestic Services	91xxxxxx
Politics/Civic Affairs Services	93xxxxxx
Power Generation/Distribution Machinery & Accessories	26xxxxxx
Printing/Photographic/Audio Visual Equipment & Supplies	45xxxxxx
Public Utilities/Public Sector Related Services	83xxxxxx
Published Products	55xxxxxx
Resin/Rosin/Rubber/Foam/Film/Elastomeric Materials	13xxxxxx
Service Industry Machinery Equipment & Supplies	48xxxxxx
Sports/Recreational Equipment, Accessories & Supplies	49xxxxxx
Structures/Building/Construction Components & Supplies	30xxxxxx
Timepieces/Jewelry/Gemstone Products	54xxxxxx
Tools/General Machinery	27xxxxxx
Transportation/Storage/Mail Services	78xxxxxx
Travel/Food/Lodging/Entertainment Services	90xxxxxx

Commodity Codes*

*This is not a comprehensive list of all account codes but contains the most commonly used.

Air Conditioning Install/Maintenance/Repair Services	72102305
Audio Visual Equipment	52161500
Chartered Bus Services	78111803
Civil Engineering	81101500
Computers	43211500
Credenzas	56101701
Desks	56101703
Electrical Engineering	81101700
Handyman Services	72101501
Hosted Services	81112106
IT Services	81160000
Lab Ovens	41104500
Laboratory and Scientific Equipment	41100000
Mail & Cargo Transport	78000000
Mechanical Engineering	81101600
Professional Engineering Services	81100000
Rats	10101505
Software	43230000
Software Maintenance & Support	81112200
Task Seating	56112102

Account Codes*

*This is not a comprehensive list of all account codes but contains the most commonly used.

Services:

Advertising	710815
Auditing & Acct Services	710510
Bank Service Charge	710812
Building Renovation	710211
Cellular & Paging Service	710412
Data Processing Service	710414
Education And Training	710514
Engineering & Architecture	710511
Freight, Express, Del	710816
General Repair	710213
Guest Package Charges	710818
Honorariums-Non-Us Resident	710517
Honorariums Us Resident	710516
Household ,Laundry, Jan, Sec	710210
HVAC Maintenance	710214
In Service Training State	710518
In Service Training-Non-State	710518
Legal	710512
Medical And Health	710813
Motorized Vehicle Services	710814
New Construct/Renovation	710212
Other Construction Service	710810
Office Equip Service	710811
Other Telephone Service	710411
Out Of State Registration	710519
Print Binding Library	710111
Printing-Binding	710110
Printing-Communication Vendor	710110
Procure Cd Service	710817
Storm Water Utility Fee	710311
Telephone And Telegraph	710410
Telephone/Internet	710413
Temp Service Commission	710513
Utilities	710310

Supplies:

Clothing	720185
Const. & Renovation Supplies	720121
Data Processing-Supplies	720130
Educational Supplies	720187
Food Supplies	720184
Fuel Supplies	720124
Jan Supplies-General	720120
Library Books	720170
Library Journals	720170
Maintenance Supplies	720122
Medical Supplies	720182
Motor Vehicle Supplies	720123
Non-Cap Off/Ed Equip	720181
Non-Capital Comp Equip	720130
Non-Capital Other Equip	720186
Non-Capital Software	720131
Office Supplies	720140
Other Supplies	720186
Participant Supplies	720150
Photographic Supplies	720160
Postage	720183
Printing-In House	720110
Procure Cd Supplies	720180
Xerox Copies	720111

Fixed Charges:

Contributions	740311
Dues And Memberships	740310
Insurance-State Purchase	740410
Other Fixed Charges	740316
Pres Choice Awards	740225
Ren-Data Proc Equip	740111
Rental Other	740116
Rental-Non St Prop	740112
Rental-Office Equip	740110
Rental-State Prop	740113
Royalties	740313
Stipend - Federal	740224
Stipends	740222

Equipment over $5000:

Computer Equipment	770110
Library Books	770116
Motor Vehicle Purchase	770113
Off/Ed Equipment	770112
Offsite Equipment	770111
Other Equipment	770115
Software Pack Purchase	770114

Capital Project Codes (Used Only With Capital Projects, 77xxxx)

Architecture Service	780210
Builder's Risk Insurance	780213
Cap Procure Cd Supply	780311
Carpet	780524
Concrete	780512
Concrete Sidewalks	780513
Construction	780510
Cost Of Building Construction	780510
Doors	780520
Electrical Systems	780529
Elevators/Escalators	780527
Finish Carpentry	780518
Finishes	780521
Fire Sprinkler System	780531
Fixed Furniture-Cap	780310
Grading-Demolition	780411
HVAC	780516
Ins & Surety Bond Cost	790120
Interior Decoration	780511
Legal Fees	780212
Lighting	780530
Masonry	780514
Millwork	780519
Mobilization	780610
Non-Cap Equip Other	780313
Plumbing	780526
Purchase Of Building	780111
Purchase Of Land	780110
Renovation	780528
Repair And Replace	780528
Roofing	780522
Rough Carpentry	780517
Site	780410
Site Work	780410
Special Construction	780525
Specialties	780523
Structural Steel	780515
Survey & Testing	780211
Tangible Equipment	780312